



Spending Perkins \$\$: What's Allowable What's Not

Presented by:
Barbara Weiss, Consultant



JACK O'CONNELL
State Superintendent
of Public Instruction

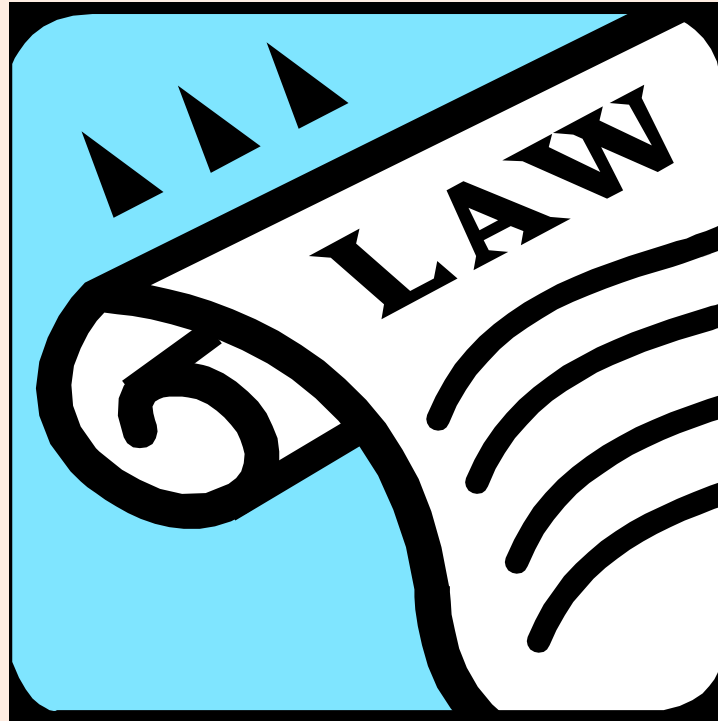
Workshop Objectives:

- 1. Review Perkins IV funding requirements.**
- 2. Discuss allowable and nonallowable expenditures.**



JACK O'CONNELL
State Superintendent
of Public Instruction

Background Information





JACK O'CONNELL
State Superintendent
of Public Instruction

Background Information

Carl D. Perkins Career and Technical Education Improvement Act of 2006, Public Law 109-270 (Perkins IV):

- Was signed into law on August 12, 2006.
- Authorizes federal funding assistance to secondary and postsecondary career technical education (CTE) programs.



JACK O'CONNELL
State Superintendent
of Public Instruction

Background Information

Perkins IV requires every state and local educational agency (LEA) receiving funding to have a Five-Year CTE Plan.

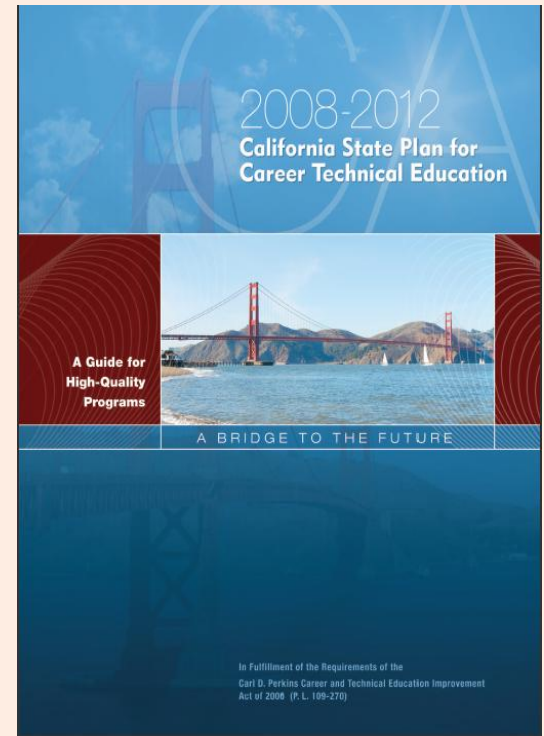
The *2008-2012 California State Plan for Career Technical Education* should be referenced in conjunction with the Perkins IV Act when determining how funds can be spent.



JACK O'CONNELL
State Superintendent
of Public Instruction

Background Information

California's State
CTE Plan is posted
at the following
outside sources:



www.wested.org/cteplan or
<http://www.cteonline.org/ctestateplan/>



JACK O'CONNELL
State Superintendent
of Public Instruction

Eligibility Requirements

Perkins IV funds may only be received by public secondary and postsecondary LEAs that conduct CTE programs.

The LEAs must demonstrate that it conducts one or more CTE programs and that each program assisted with Perkins IV funds complies with the requirements in Perkins IV Section 135(b) and Chapter Five of the State Plan.



JACK O'CONNELL
State Superintendent
of Public Instruction

Eligibility Requirements

Recipients of the Perkins IV grant must have an approved 2008–2012 Local Career Technical Education Plan on file with the California Department of Education (CDE).

**2008-2012 Local Plan
for
Career Technical Education**

In fulfillment of State Plan requirements and the
requirements of the
Carl D. Perkins Career and Technical Education
Improvement Act of 2006
P.L. 109-270

Agency Name

Person at, or representing, the eligible recipient responsible for answering questions on
this plan:

Signature: _____
Name: _____
Title: _____
Telephone: _____
E-mail: _____
Date: _____

6/08
California Department of Education



JACK O'CONNELL
State Superintendent
of Public Instruction

Eligibility Requirements

Perkins funds are available to:

- Secondary LEAs, grades seven through twelve (Section 131),
and
- Postsecondary LEAs
(Section 132)



JACK O'CONNELL
State Superintendent
of Public Instruction

Secondary LEAs (Section 131)

- Include union high or unified school districts; public charter schools; county offices of education.
- Minimum grant allocation is \$15,000.
- If the LEA's allocation does not equal \$15,000:
 - Enter into a consortium
 - Apply for a waiver if:
 - Located in a rural, sparsely-populated area, and;
 - Can demonstrate inability to enter into a consortium.



JACK O'CONNELL
State Superintendent
of Public Instruction

How are Section 131 (Secondary) Allocations Determined?

- 30 percent is based on the LEA's proportion of the State's kindergarten through grade twelve (K-12) enrollment
- 70 percent is based on the LEA's proportion of the State's K-12 enrollment of students from homes with incomes below the poverty level



JACK O'CONNELL
State Superintendent
of Public Instruction

Postsecondary LEAs (Section 132)

- Include community college districts, CTE programs for adults conducted by unified or union high school districts, and Regional Occupational Centers or Programs (ROCPs) serving adults
- Minimum grant \$50,000
- If the LEA's allocation does not equal \$50,000:
 - Must join a consortium
 - No waivers



JACK O'CONNELL
State Superintendent
of Public Instruction

How are Section 132 (Postsecondary) Allocations Determined?

- Based entirely on the number of economically disadvantaged adults enrolled in CTE programs during the previous program year



JACK O'CONNELL
State Superintendent
of Public Instruction

How do LEAs get Perkins Funds?





JACK O'CONNELL
State Superintendent
of Public Instruction

How do LEAs get Perkins Funds?

- LEAs complete an annual Perkins Application due to the CDE on or before May 1 of each year.
- On the application the LEA identifies a Perkins Coordinator to be in contact with the CDE about its CTE programs and the budget.

DUE DATE: May 1, 2010

Carl D. Perkins Career and Technical Education Improvement Act of 2006
 APPLICATION FOR 2010-11 FUNDING

Local Educational Agency (LEA):		County-District (CD) Code:	
Address of LEA:		Check Appropriate Box: <input type="checkbox"/> Sec. 112 - State Institutions <input type="checkbox"/> Sec. 131 - Secondary <input type="checkbox"/> Sec. 132 - Adult/ROCP	
Name of LEA Superintendent or Chief Administrator:			
Allocation Amount: \$		Board Approval Date:	
Name of Perkins Coordinator:	Telephone Number:	Extension:	
Title:	Fax Number:	E-mail Address:	
Perkins Coordinator's Address (if different from LEA address above):			

CERTIFICATION: I hereby certify that all state and federal rules and regulations will be observed and that the assurances and certifications related to this program are accepted as the conditions in the operation of this program. The funds associated with this application will support the implementation of our 2008-2012 local Career Technical Education (CTE) Plan and provide a program that is of sufficient size, scope, and quality to effectively address the career preparation needs of our students. This funding will supplement state and local CTE funds and improve, enhance, or expand our CTE programs in the 2010-11 school year. I certify that, to the best of my knowledge, the information contained in this application is correct and complete.

Printed Name of Superintendent or Designee:	Title (if not superintendent):
Signature of Superintendent or Designee:	Date:

CALIFORNIA DEPARTMENT OF EDUCATION USE ONLY	
Reviewed and Recommending Approval:	Date:
Final Approval:	Date:



JACK O'CONNELL
State Superintendent
of Public Instruction

The Application includes:

**CDE 101-A,
Budget and Expenditure
Schedule**

and

**a Budget Narrative
for the a fiscal year, July-June**

CDE 101-A

Budget and Expenditure Schedule

CALIFORNIA DEPARTMENT OF EDUCATION
Secondary, Postsecondary, and Adult Leadership Division
CDE 101-A (1/08)

Sample BUDGET AND EXPENDITURE SCHEDULE

CAREER TECHNICAL EDUCATION APPLICATION
Carl D. Perkins Career and Technical
Education Improvement Act of 2006

Local Educational Agency (LEA): Sample California School District

CD Code: 00-12345

Authorized Signature: _____

Total Allocation:
Indirect Cost Rate (percent):

\$221,070
4.32%

Select One

- ORIGINAL BUDGET
 REVISION DATE _____
 END-OF-YEAR CLAIM

Funding Source and Purpose:

- Section 112 State Institutions
 Section 131 Secondary
 Section 132 ROCP and Adult

Object Code and Budget Category	(A) Instruction (Including Career Technical Student Organizations)	(B) Professional Development	(C) Curriculum Development	(D) Transportation & Child Care For Economically Disadvantaged Participants	(E) Special Populations Services	(F) Research Evaluation & Data Development	(G) Guidance & Counseling	(H) Administration or Indirect Costs	(I) Total
Percentage of grant expenditures allowed		At least 85% of the grant must be spent in these areas				No more than 10% may be spent in these areas		Not to exceed 5% of total expenditure	
1000	Certificated Salaries	8,625	1,440	3,750					13,815
2000	Classified Salaries	10,800							10,800
3000	Employee Benefits	2,421	888	750					4,059
4000	Books/ Supplies	147,346							147,346
5000	Services/ Operating	15,000			3,000	1,600			19,600
6000	Capital Outlay	17,000							17,000
7000	Indirect Costs							8,451	
	Total	228,192	2,328	4,500	3,000	1,600		8,451	221,070

Budget Narrative

Appendix B

Sample Perkins IV Budget Narrative

OBJECT #	DESCRIPTION	AMOUNT
1000	Certificated Salaries	
A (Instruction)	<ul style="list-style-type: none"> Substitute costs for teachers to attend conferences and workshops pertinent to their career industry sector. 45 substitute days x \$125.00/day 	\$5,625.00
B (Professional Development)	<ul style="list-style-type: none"> Stipend for Business Teacher to serve as the FBLA advisor and coach for after school/weekend FBLA activities. Teacher release time for Professional Development/CTE Training activities to include: <ul style="list-style-type: none"> Pathway and Foundation Standard Integration; All Aspects of the Industry; Special Populations/Nontraditional Careers Counselor Professional Development: Specific training and information to guide CTE students through choices of CTE courses, clarity regarding CTE programs, industry sectors and pathways, and career options – six counselors @ \$40.00/hour x six hours 	\$3,000.00
C (Curriculum Development)	<ul style="list-style-type: none"> Teacher release time for cross curricular collaboration and curriculum integration. Teacher release time for new course development for new programs in three industry sectors (Health, Energy and Utilities, and, Building Trades and Construction). Teacher release time for the development of industry assessments. Teacher release time for articulation with community colleges and universities. Total 30 substitute days x \$125.00/day = \$3,750.00 	\$1,440.00
	Subtotal for 1000 category	\$3,750.00
		\$13,815.00
2000	Classified Salaries	
	<ul style="list-style-type: none"> Three Career Technicians two hours/day at the three high school sites to schedule guest speakers for CTE classes; facilitate internships/student placement/ Community College activities/field trips for CTE students. 	\$10,800.00
	Subtotal for 2000 category	\$10,800.00
3000	Benefits	
	<ul style="list-style-type: none"> Certificated: STRS, MED, SUI, WWC, Cert., PERS, Retiree benefits fund liability @ 20 %. Classified allocation: STRS, MED, SUI, WWC, Cert., PERS, Retiree benefits fund liability. @ 12 % 	\$2,763.00
	Subtotal for 3000 category	\$1,296.00
		\$4,059.00
4000	Books and Supplies	
	<ul style="list-style-type: none"> Brochures for CTE Industry Sector/classes for marketing program = \$4,000.00 Professional development supplies for teacher and counselor training as noted in 1000 = \$4,346.00 Non-capitalized Equipment for existing CTE Programs at all three comprehensive high schools identified in Section IV of this application. <ul style="list-style-type: none"> Child Development = \$15,000.00 – smart board, projector, speakers, laptops, software, videos, manipulative for preschool. 	\$4,000.00
		\$4,346.00
		\$139,000.00

Budget Narrative

OBJECT #	DESCRIPTION	AMOUNT
	<ul style="list-style-type: none"> ▪ Fashion Design= \$4,000.00 – sewing machines and mannequin dress forms. ▪ Food/Hospitality = \$15,500.00 - two industry grade stoves, food processors, mixers, specialty knives. ▪ Culinary Arts = \$13,000.00 – kitchen aids mixers, blenders, microscopes, dictionaries. ▪ Building Construction = \$5,000.00 – misc. hand tools, hand held power saws, nail guns. ▪ Media Support = \$50,000.00 – 36 computers @ \$1400.00 per computer; software for new lab at CHS; upgraded computers at HHS = \$8,000.00 ▪ Information/Support: \$8,500.00 – software/Microsoft special training. ▪ Transportation = \$20,000.00 program expansion and hand tools of various degrees; supplemental books and supplies for classroom. 	
	Subtotal for 4000 category	\$147,346.00
5000 F (Data Development) E (Special Populations)	Services and other operating expenditures: <ul style="list-style-type: none"> ▪ Software to get data for Perkins required reports ▪ Contract with outside consultant to provide training for staff related to Special Populations and Nontraditional Careers Travel and Conferences for Career Teams to attend State and Local Conference for purposes of program development, implementation and CTE program planning.	\$1,600.00 \$3,000.00 \$15,000.00
	Subtotal for 5000 category	\$19,600.00
6000	Capital Outlay (list items below) <ul style="list-style-type: none"> ▪ Architectural Engineer Package = \$17,000.00 Paton Engraving Machine equipment including base unit, imaging cartridge, Corel Draw X#, Honeycomb Cutting Table, Purex Filtration system, and installation. 	\$17,000.00
	Subtotal for 6000 category	\$17,000.00
7000	Indirect @ 4.32% (minus capital outlay)	\$8,451.00
	GRAND TOTAL	\$221,070.00

CDE 101-A, Budget and Expenditure Schedule, serves as a budget document at the beginning of the fiscal year.

CALIFORNIA DEPARTMENT OF EDUCATION
Secondary, Postsecondary, and Adult Leadership Division
CDE 101-A (1/08)

BUDGET AND EXPENDITURE SCHEDULE

Sample

CAREER TECHNICAL EDUCATION APPLICATION
Carl D. Perkins Career and Technical
Education Improvement Act of 2006

Local Educational Agency (LEA): Sample California School District

CD Code: 00-12345

Authorized Signature: _____

Total Allocation: \$221,070
Indirect Cost Rate (percent): 4.32%

Select One
 ORIGINAL BUDGET
 REVISION DATE _____
 END-OF-YEAR CLAIM

Funding Source and Purpose:
 Section 112 State Institutions
 Section 131 Secondary
 Section 132 ROCP and Adult

Object Code and Budget Category	(A) Instruction (Including Career Technical Student Organizations)	(B) Professional Development	(C) Curriculum Development	(D) Transportation & Child Care For Economically Disadvantaged Participants	(E) Special Populations Services	(F) Research Evaluation & Data Development	(G) Guidance & Counseling	(H) Administration or Indirect Costs	(I) Total
Percentage of grant expenditures allowed	At least 85% of the grant must be spent in these areas					No more than 10% may be spent in these areas		Not to exceed 5% of total expenditure	
1000	Certificated Salaries	8,625	1,440	3,750					13,815
2000	Classified Salaries	10,800							10,800
3000	Employee Benefits	2,421	888	750					4,059
4000	Books/ Supplies	147,346							147,346
5000	Services/ Operating	15,000			3,000	1,600			19,600
6000	Capital Outlay	17,000							17,000
7000	Indirect Costs							8,451	
	Total	228,192	2,328	4,500		3,000	1,600	8,451	221,070

It identifies all items and services that are planned to be purchased and provides a cost projection for the expenditures.

BUDGET **Sample**
MID EXPENDITURE SCHEDULE

Local Educational Agency (LEA): Sample California School District

CD Code: 00-12345

Authorized Signature: _____

Total Allocation: \$221,070
Indirect Cost Rate (percent): 4.32%

Select One
 ORIGINAL BUDGET
 REVISION DATE _____
 END-OF-YEAR CLAIM

Funding Source and Purpose:
 Section 112 State Institutions
 Section 131 Secondary
 Section 132 ROCP and Adult

Object Code and Budget Category		(A) Instruction (Including Career Technical Student Organizations)	(B) Professional Development	(C) Curriculum Development	(D) Transportation & Child Care For Economically Disadvantaged Participants	(E) Special Populations Services	(F) Research Evaluation & Data Development	(G) Guidance & Counseling	(H) Administration or Indirect Costs	(I) Total
Percentage of grant expenditures allowed		At least 85% of the grant must be spent in these areas					No more than 10% may be spent in these areas		Not to exceed 5% of total expenditure	
1000	Certificated Salaries	8,625	1,440	3,750						13,815
2000	Classified Salaries	10,800								10,800
3000	Employee Benefits	2,421	888	750						4,059
4000	Books/ Supplies	147,346								147,346
5000	Services/ Operating	15,000				3,000	1,600			19,600
6000	Capital Outlay	17,000								17,000
7000	Indirect Costs								8,451	
	Total	228,192	2,328	4,500		3,000	1,600		8,451	221,070



JACK O'CONNELL
State Superintendent
of Public Instruction

How Can Perkins IV Funds Be Used?





JACK O'CONNELL
State Superintendent
of Public Instruction

How Can Perkins IV Funds Be Used?

Section 135(a) of Perkins IV states, “Each eligible recipient (LEA) of the Section 131 and 132 funds shall use these funds to improve CTE programs.”

Section 135(b)(7) states, “Funds . . . shall be used to support CTE programs that initiate, improve, expand and modernize quality CTE programs, including relevant technology.”



JACK O'CONNELL
State Superintendent
of Public Instruction

How Can Perkins IV Funds Be Used?

These two sections of Perkins IV make it clear that the **funds may not be used to simply maintain an ongoing program.**



JACK O'CONNELL
State Superintendent
of Public Instruction

How Can Perkins IV Funds Be Used?

The CDE has interpreted this to mean that funds may only be used to support activities intended to:

- modify or update existing programs—**IMPROVE,**
- **ENHANCE** the effectiveness of existing programs, and
- develop and implement new programs—**EXPAND.**



JACK O'CONNELL
State Superintendent
of Public Instruction

Supplement vs. Supplant

- Perkins IV funds must supplement, or augment, and not supplant state or local funds. Federal funds may not result in a decrease of state or local funding that would have been available to conduct the activity had federal funds not been received.
- LEAs must be able to demonstrate that federal funds are added to the amount of state and local funds that would be made available for uses specified in the local plan.



JACK O'CONNELL
State Superintendent
of Public Instruction

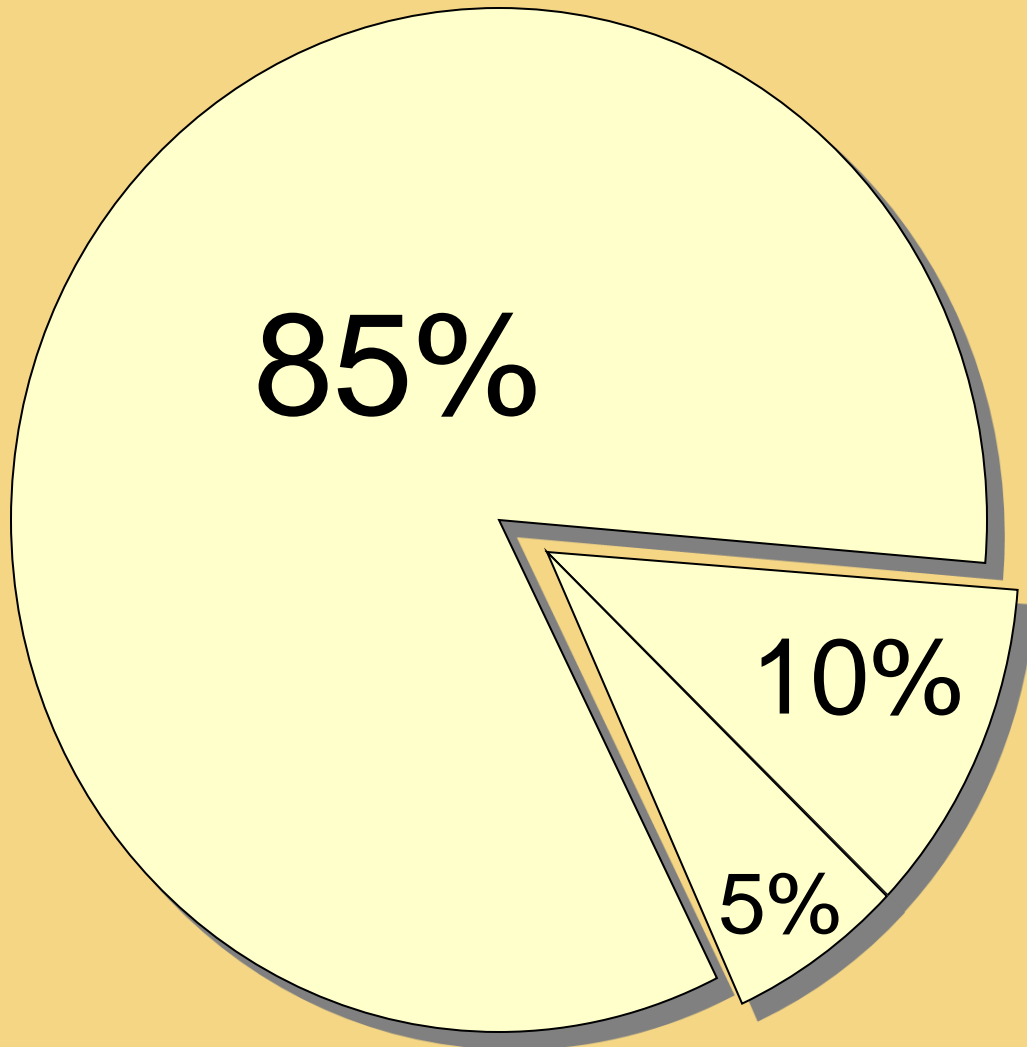
How Can Perkins IV Funds Be Used?

Perkins IV and Chapter Five of the State Plan establish the use of funds requirements and policies for CTE programs assisted with Perkins IV funds.

These policies and requirements must be followed by all LEAs receiving Perkins IV funds.

Chapter 5, 2008-2012 California State Plan for Career Technical Education

How Can Perkins IV Funds Be Used?



- 85 percent must be spent in CTE classrooms.
- 10 percent can be spent on other CTE activities outside the classroom.
- Up to 5 percent can be spent on Program Administration.

Policy 1: Use of Perkins IV Funds



No less than 85 percent of the LEA's allocation must be spent to improve or expand CTE programs and courses approved in the local plan and annual application for funds.

85 percent goes to the classroom

85 percent goes to CTE classes

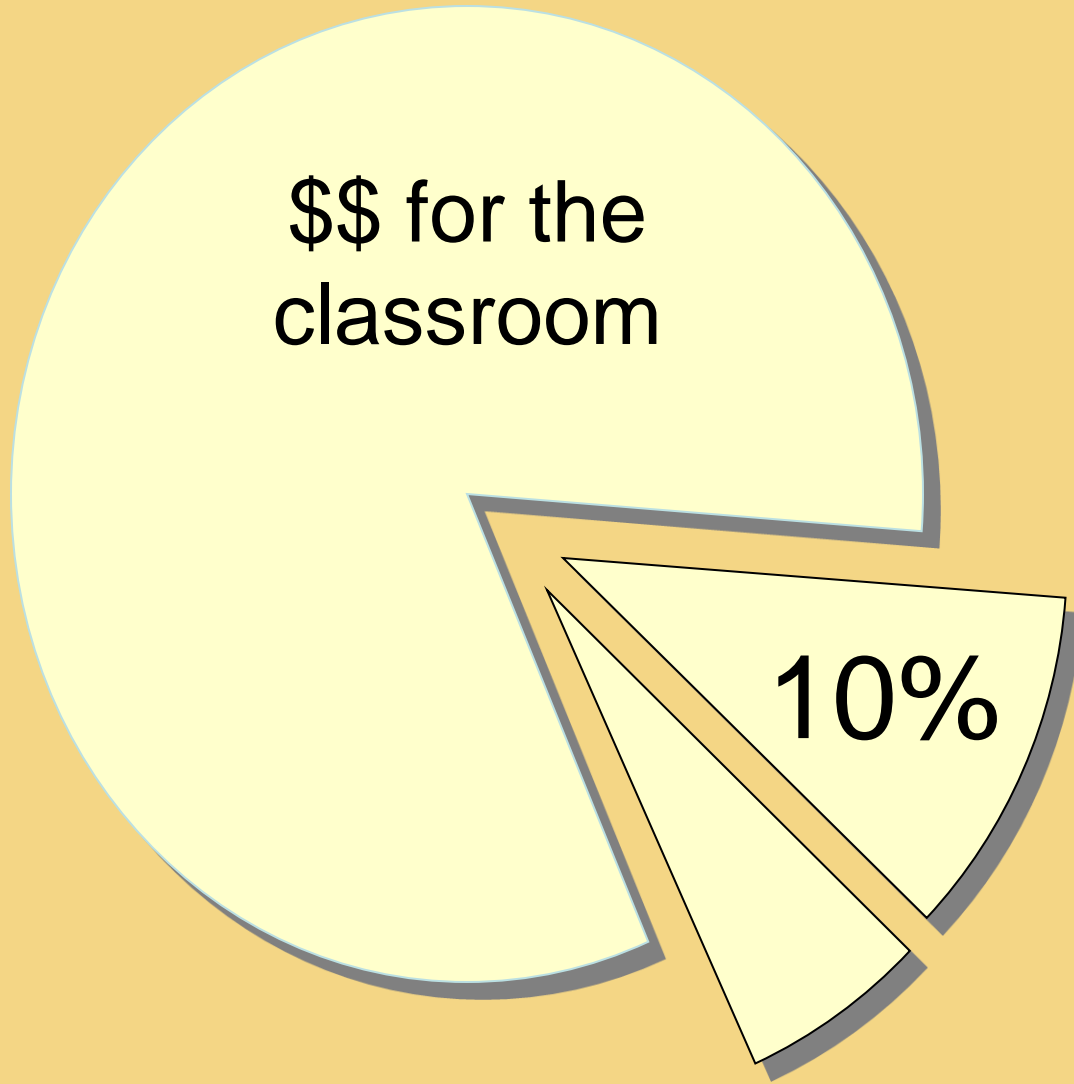
Program planning, development, validation and accountability activities:

- Instructional equipment related to the CTE industry sector
- Professional development activities
internships for teachers and activities that address integration of academics and CTE
- CTE curriculum development

85 percent goes to CTE classes

- Additional instructor costs incurred by the expansion of existing programs or addition of a new program (3-year limitation)
- Staff and operational costs for state and nationally recognized career technical student organizations (CTSOs)
- Programs or instructional support for Special Population students

Policy 1: Use of Perkins IV Funds



Up to 10 percent may be spent to provide other activities that support CTE and that may not occur in a classroom.

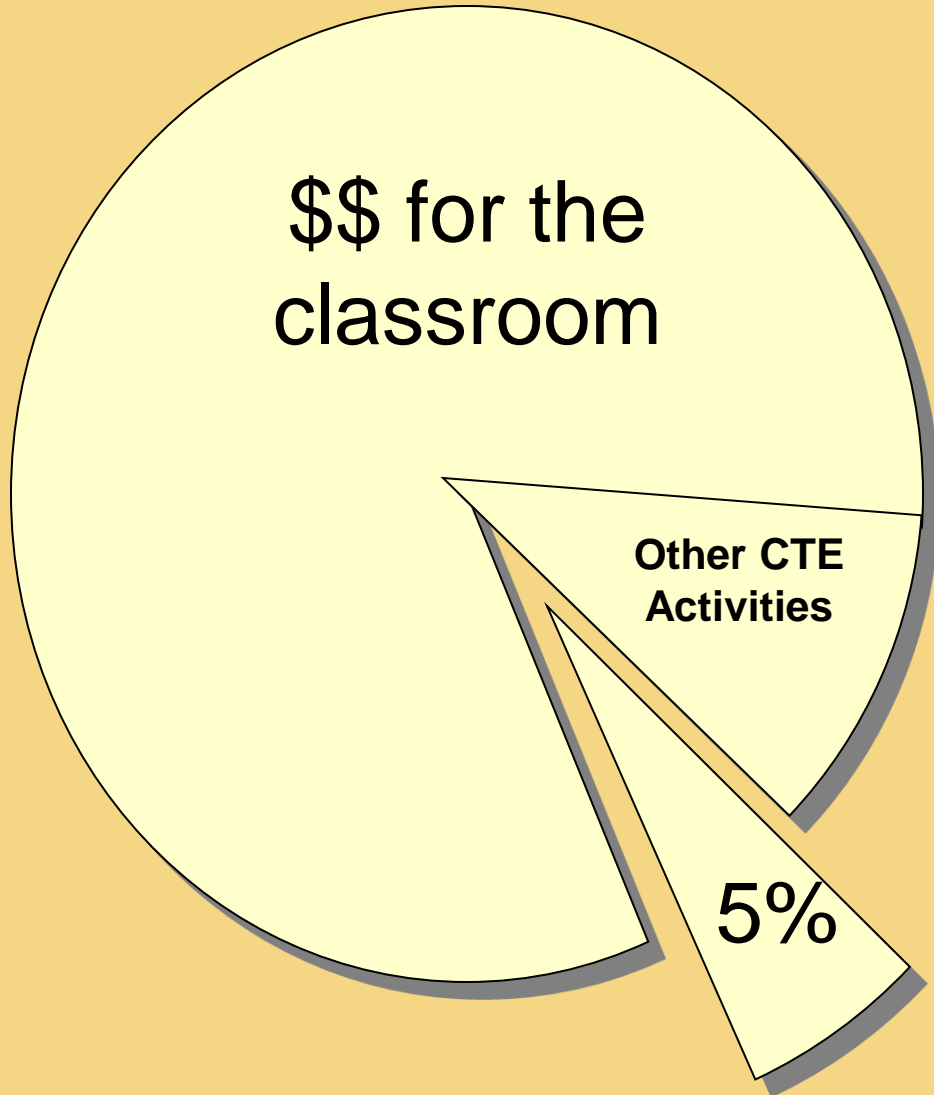
10 percent supports other CTE activities

- Career guidance and academic counseling for students participating in CTE programs
- Developing and supporting small, personalized, career-themed learning communities
- Involving parents, business, labor in design, implementation, and evaluation of CTE
- Support training or activities in nontraditional fields

10 percent supports other CTE activities

- Developing and expanding programs for adults at times and in formats accessible for students, including working students
- Providing CTE programs for adults and school dropouts to complete secondary education or upgrade technical skills
- Provide CTE completers with placement assistance in jobs, advanced education, or training

Policy 1: Use of Perkins IV Funds



Up to 5 percent of the grant allocation may be charged for the direct or indirect costs of administering the grant.

Indirect Cost Rate

- The LEA usually applies its indirect cost rate for the administration of a grant in order to cover agency wide, general management costs.
- Annually, the CDE negotiates with every LEA to determine an indirect cost rate that the LEA can charge for their indirect costs.

Indirect Cost Rate

- Some programs have a cap or limit on the amount of indirect costs that can be charged.
- Usually The LEA may claim up to its approved indirect cost rate unless there is specific authority (legislation or regulation) to limit the rate.

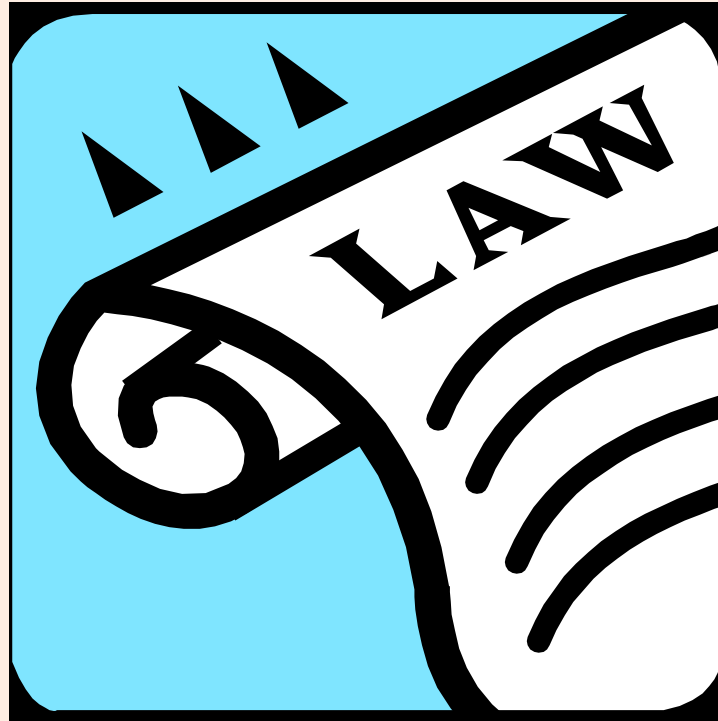
In the Perkins IV grant,

- the LEA may charge indirect costs up to the CDE approved indirect cost rate if that rate is less than 5 percent.
- If the LEA's approved indirect cost rate is greater than 5 percent, the LEA can only charge 5 percent indirect cost rate, no more.



JACK O'CONNELL
State Superintendent
of Public Instruction

Other Policies Affecting Spending





JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 6: Middle School Participation in the Perkins IV Funds

Middle school (grades seven and eight) CTE courses may be assisted with Section 131 (secondary) funds only if the courses directly lead to an approved sequences of courses conducted by a high school.



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 7a: ROCP Participation in the Perkins IV Section 131 Funds

- ROCPs may receive funds directed to county offices of education (COE).
- Section 131 allocations to COEs will no longer be restricted to court and community school use.



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 7a: ROCP Participation in the Perkins IV Section 131 Funds

- Some or all of a COE allocation could be used for ROCP program improvements, which could include programs for court and community school students.



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 9: Consortium Allocations

- Section 131 and 132 consortium funds may not be redistributed to individual members for purposes or programs that benefit only one member.

No pass through!



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 9: Consortium Allocations

- Funds allocated to a consortium formed to meet the minimum allocation requirement may be used only for purposes and programs that are mutually beneficial to all members of the consortium.



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 10: Use Funds to Support Work Experience Education

Section 131 and 132 funds may **not** be used to assist General Work Experience Education.



JACK O'CONNELL
State Superintendent
of Public Instruction

Policy 10: Use Funds to Support Work Experience Education

Work Experience Education activities may be assisted with Section 131 or 132 funds if:

- they are a planned and listed component of a CTE program,
- are integral to one or more of the approved sequences of courses in the LEA's local plan and annual application for funds, and
- comply with applicable State and federal regulations.



JACK O'CONNELL
State Superintendent
of Public Instruction

So, on what **CAN** I spend Perkins Funds?





JACK O'CONNELL
State Superintendent
of Public Instruction

Carefully consider:

- Distribution of Perkins IV funds should **not** depend on the number of students currently served, but which CTE programs need additional funds to improve or expand.
- What are the demands of the local economy? What jobs will be in the community in five to ten years? Do not base funding on what program students like best.



JACK O'CONNELL
State Superintendent
of Public Instruction

Carefully consider:

- Every CTE program does not have to get Perkins funds every year; instead rotate through CTE programs over a two-to-four year cycle. This is especially important if the LEA gets limited Perkins funding.
- Student safety, having equipment that meets industry standards, or providing professional development to remain current with all aspects of the industry.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- Pay teachers (summer work, after school hours) or pay substitute costs to participate in CTE professional development, curriculum or assessment development, to articulate with community college staff on programs of study.
- Stipend a teacher to be a CTSO advisor.
- Stipend a teacher to do an industry externship during summer or a break.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- Pay a classified staff person to:
 - contact CTE students who graduated the previous spring to gather E-2 data.
 - schedule industry speakers for CTE classes.
 - identify and make contact with potential CTE advisory committee members.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- Pay a classified staff person to:
 - arrange internships or jobs for CTE students.
 - arrange externships for CTE teachers or for academic teachers working with CTE programs.

NOTE: Expenditures related to guidance and counseling fall under the 10 percent for CTE activities outside the classroom.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **Buying CTE Equipment**
 - Upgrade equipment for CTE programs to align with industry standards
 - Equipment must be directly related to a CTE industry sector; NOT equipment that the district provides to academic teachers, i.e. LCD projectors or SmartBoards
 - No hand-held assessment devices



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **CTE Equipment – Capital Outlay**
 - CTE equipment that meets industry standards can be expensive. Any single piece of equipment over \$5000 is a Capital Outlay.
 - Permission is required to purchase any piece of equipment that is Capital Outlay.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **CTE Equipment – Capital Outlay**
 - Complete the form on the Perkins Web page at <http://www.cde.ca.gov/ci/ct/pk/documents/outlay.doc>.
 - Email form to your CDE consultant who will review and approve expenditure.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **CTE Equipment** purchased totally or in part with federal funds is subject to both federal and state laws, rules, and regulations. The LEA is required to establish property-management policies and procedures and to maintain equipment inventory-control records.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **Books and Supplies**

- Supplemental textbooks.
NOTE: Replacement of primary CTE textbooks is the responsibility of the LEA, so Perkins funds usually cannot be used to purchase primary textbooks.
- Perkins funds can be used to purchase new primary textbooks when a new CTE course that has never been taught before is offered.
- Industry-related magazines or periodicals



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **Books and Supplies**

- Supplies that improve, enhance, or expand the CTE program in order to keep up with industry standards. This does not include the day-to-day supplies to maintain an existing CTE program (no food in a culinary arts program, no nails in a wood shop, no rags in an auto shop, no ink cartridges or paper).
- Perkins funds can be used to purchase all supplies when a new CTE course that has never been taught before is offered.



JACK O'CONNELL
State Superintendent
of Public Instruction

Allowable Expenditures

- **Purchasing Services**

- Contract with a CTE professional development provider.
- Travel and registration costs for CTE teachers to attend state CTE conferences or local workshops learn about CTE program development, planning, implementation, or assessment.
- Transportation for CTE students to visit an industry related facility to learn about jobs; not college field trips for all students



JACK O'CONNELL
State Superintendent
of Public Instruction

What Expenditures **CANNOT** Be Made with Perkins IV Funds?





JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Gifts, door prizes, trophies, awards that become the personal property of a student, teacher, etc.
- Instructional aids, uniforms, tools, or other items that may be retained by students
- Promotional items, such as T-shirts, pens, cups, key chains, and other memorabilia



JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Dues/memberships for professional societies or organizations
- Equipment and supplies for building maintenance
- Furniture, files, and equipment used by a CTE teacher (if the LEA equips academic classrooms with a laptop computer, LCD projector, SmartBoard, etc., the same equipment must be provided by the LEA in CTE classrooms)



JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Lodging, food, dues, individual transportation for students in CTSOs
- Out-of-state travel for students or teachers
- Conference travel not related to CTE program improvement
- Meals, banquets, entertainment – No food for meetings



JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Standard classroom furniture not specific and unique to the CTE industry sector
- General storage files or cabinets not designed to store specific CTE tools or equipment
- Vehicles such as automobiles, trucks, buses, utility vehicles, airplanes, boats, golf carts



JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Constructing, renovating, or remodeling any facilities
- Equipment or supplies not used directly to teach CTE skills to students
- Salaries or wages paid to students, including Work-Study programs
- College testing fees for students, college course fees for teachers, distance learning fees



JACK O'CONNELL
State Superintendent
of Public Instruction

Nonallowable Expenditures

- Tuition for either technical or academic courses for a teacher to meet degree or certificate requirements
- Costs of advertising and public relations designed to solely promote the LEA
- Career Guidance materials for **ALL** students, i.e., LEAs cannot purchase COIN, Career Cruising, EUREKA, Choices, or Kuder with Perkins funds.

California's Perkins IV Funds support



State of California
californiacareers.info
Providing career development resources for California



California Career
**Cal
CRN**
Resource Network

[home](#) [about](#) [presentations](#) [partner agencies](#) [contact](#) [what's new!](#)

Welcome to CaliforniaCareers.Info, the web home of the California Career Resource Network. This website contains resources for students, counselors, parents, teachers, in short, anyone interested in developing the career self-management skills necessary in today's world of work. Feel free to stay a while and come back often, we hope you enjoy the journey.



students



educators





job and career seekers



[Home](#) · [About](#) · [Presentations](#) · [Partner Agencies](#) · [Contact](#) · [What's New!](#)

	Choices www.bridges.com	EUREKA www.eureka.com	COIN www.coinedu.com	Career Cruising www.careercruising.com	Kuder www.ca.kuder.com	Career Zone www.careerzone.org
Target Audience	Elementary School Middle School High School** College	California High School Students Job Seekers	All Populations Elem School (K-5) Middle School (6-8) Career High School (9-12)	High School	6 th grade- Adult	California High School Students California Jobseekers
Languages Offered	English Spanish	English Spanish	English Spanish	English Spanish French	English Spanish	English
Cost	\$525 - \$1,025 (Choices CD Edition) \$400 - \$900 (online edition) Based on student enrollment Annual renewal fee	\$395 - \$3390 (CD and Internet) \$695 - \$1,295 (CD only or Internet only) Based on number of users	Middle-to-High School s priced at \$395 for school enrollments under 300 students and \$695 for enrollments over 300. All workbooks are priced at \$23.95 for 10 except for the COIN Educational Inventory which is \$24.50 The COIN Individual Career Planning Portfolios for Primary, Intermediate or Secondary: package of 50 for \$57.50	\$595: English Only \$795: Bilingual English/Spanish or English/French	Approximately \$1 per student	FREE



State of California

californiacareers.info

Providing career development resources for California



home about presentations partner agencies contact what's new!

Welcome to CaliforniaCareers.Info, the web home of the California Career Resource Network. This website contains resources for students, counselors, parents, teachers, in short, anyone interested in developing the career self-management skills necessary in today's world of work. Feel free to stay a while and come back often, we hope you enjoy the journey.



students



educators



job and career seekers



Home · About · Presentations · Partner Agencies · Contact · What's New!

<http://www.californiacareers.info/>



JACK O'CONNELL
State Superintendent
of Public Instruction

When in doubt about an expenditure,
use EDGAR.

U.S. Education Department General
Administrative Regulations (EDGAR)
provides the rules for allowable
expenditures:

- (1) The cost must be directly related to a CTE program identified in the LEA's local CTE plan and annual application;



JACK O'CONNELL
State Superintendent
of Public Instruction

- (2) The activity must be intended to improve the targeted CTE program;
- (3) The cost must be "necessary" and "reasonable" for proper and efficient administration of the CTE program; and
- (4) The cost must be specific to the targeted program—as opposed to a general expense required to carry out the LEA's overall responsibilities.



JACK O'CONNELL
State Superintendent
of Public Instruction

Payment Procedures and Timeline





JACK O'CONNELL
State Superintendent
of Public Instruction

Perkins IV funds are provided to LEAs on a reimbursement basis only.

Why?



JACK O'CONNELL
State Superintendent
of Public Instruction

Payment Procedures

- U.S. Education Department General Administrative Regulations (EDGAR) states that federal funds must be spent within 72 hours of receipt at the local level.
- Since that is unlikely to happen in California; the CDE reimburses LEAs for approved CTE expenditures.



JACK O'CONNELL
State Superintendent
of Public Instruction

Payment Timeline

Quarterly claims for reimbursements may be submitted four times a year, preferably before the deadline date.

Grant Quarter	Months in which Expenditures Occurred	Deadline to Submit VE-5
First	July, August, September	October 31
Second	October, November, December	January 31
Third	January, February, March	April 30
Final	April, May, June	September 1



JACK O'CONNELL
State Superintendent
of Public Instruction

Payment Timeline

Filing of a Second Quarter, mid-year, claim in January is **MANDATORY.**

Grant Quarter	Months in which Expenditures Occurred	Deadline to Submit VE-5
First	July, August, September	October 31
Second	October, November, December	January 31
Third	January, February, March	April 30
Final	April, May, June	September 1

May 1
Perkins Application due

May – August
CDE approves
Perkins application
with CDE 101-A and
Budget Narrative

CTE Programs
spend funds as
indicated in
Perkins Application
and
Local CTE Plan

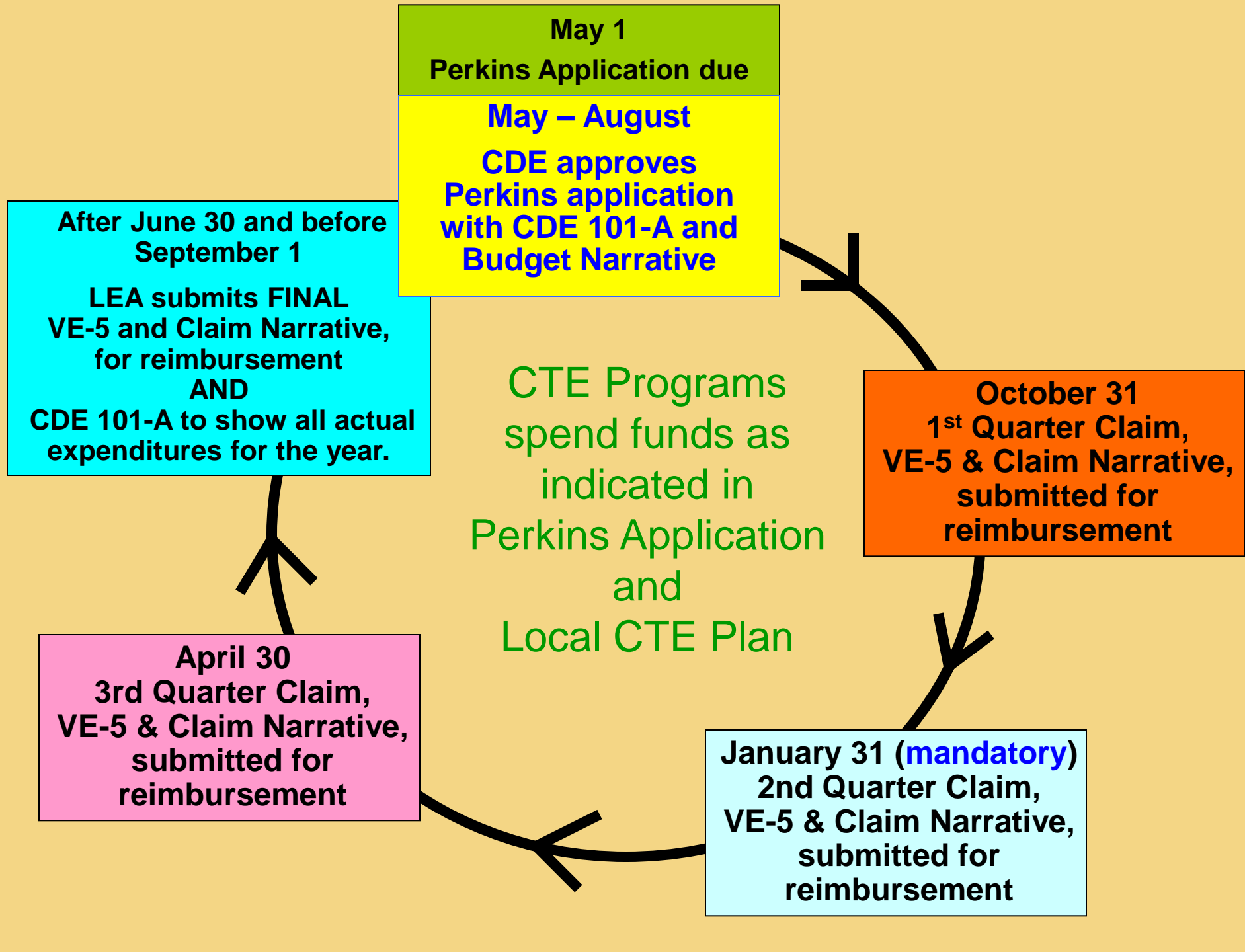
October 31
1st Quarter Claim,
VE-5 & Claim Narrative,
submitted for
reimbursement

January 31 (mandatory)
2nd Quarter Claim,
VE-5 & Claim Narrative,
submitted for
reimbursement

After June 30 and before
September 1

LEA submits FINAL
VE-5 and Claim Narrative,
for reimbursement
AND
CDE 101-A to show all actual
expenditures for the year.

April 30
3rd Quarter Claim,
VE-5 & Claim Narrative,
submitted for
reimbursement

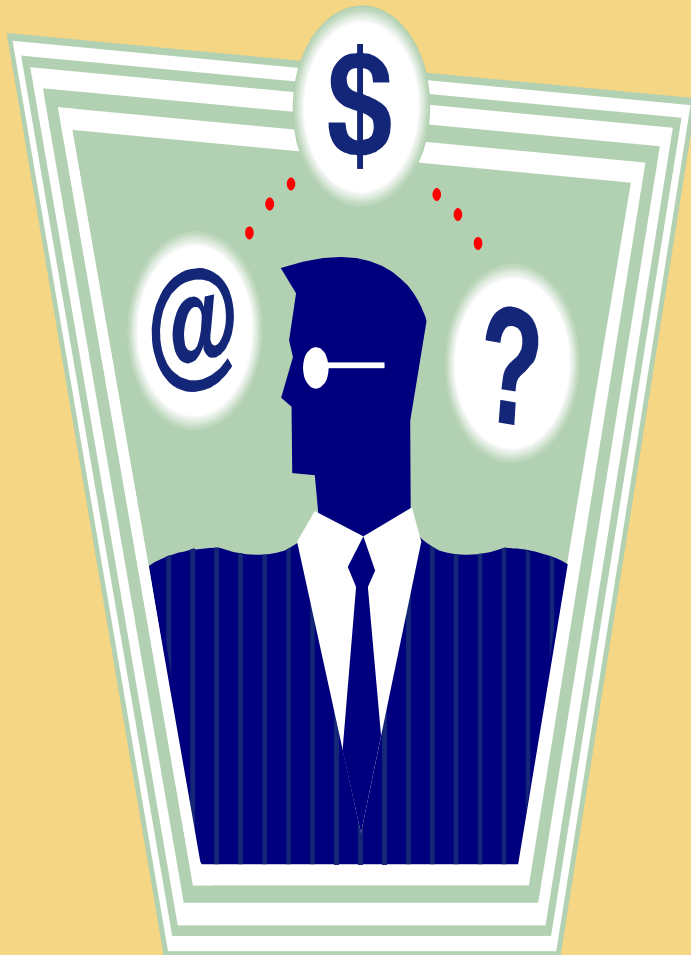




JACK O'CONNELL
State Superintendent
of Public Instruction

Payment Timeline

- All funds must be expended or legally obligated by **June 30, 2011**.
- Any funds left unclaimed after September 30, 2011 will revert to the CDE for reallocation to other LEAs in 2012-13.



- If there are questions about
- how Perkins funds can be spent,
 - allowable and nonallowable expenditures; and/or
 - getting reimbursement payments in a timely manner,
- contact the CDE consultant or analyst responsible for your grant.

For Program Assistance Contact

- Reg. 2 & 9, Geoff Belleau: 916-323-5042
- Reg. 4 & 6, Mary Gallet: 916-445-5723
- Region 11, Lee Murdock: 916-445-5736
- Reg. 3 & 8, Charles Parker: 916-323-2564
- Reg. 5 & 7, Deirdre Ransome: 916-319-0491
- Reg. 1 & 10, Barbara Weiss: 916-319-0465
- State Special Schools and County Offices,
Hilary Steinmetz: 916-445-5725

For Fiscal Assistance Contact a CDE Analyst

- Reg. 1, 5, 7, & 10

Carla Ciarniello 916-323-5054

- Reg. 2, 4, 6, & 9:

Laurie SooHoo 916-445-5727

- Reg. 3, 8, 11, State Special Schools and
County Offices :

Mary Brown 916-323-5741

CDE Consultant	CDE Analyst	Region	Counties Served Within the county Superintendents Regions
Barbara Weiss 916-319-0465 bweiss@cde.ca.gov	Carla Ciarniello 916-323-5054 cciarnie@cde.ca.gov	1	Del Norte, Humboldt, Lake, Mendocino, Sonoma
		10	Inyo, Mono, Riverside, San Bernardino
Geoff Belleau 916-323-5042 gbelleau@cde.ca.gov	Laurie SooHoo 916-445-5727 lsoohoo@cde.ca.gov	2	Butte, Glenn, Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity
		9	Imperial, Orange, San Diego
Chuck Parker 916-323-2564 cparker@cde.ca.gov	Mary Brown 916-323-5741 mabrown@cde.ca.gov	3	Alpine, Colusa, El Dorado, Placer, Nevada, Sacramento, Sierra, Sutter, Yolo, Yuba
		8	Kern, San Luis Obispo, Santa Barbara, Ventura
Mary Gallet 916-445-5723 mgallet@cde.ca.gov	Laurie SooHoo 916-445-5727 lsoohoo@cde.ca.gov	4	Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Solano
		6	Amador, Calaveras, San Joaquin, Stanislaus, Tuolumne
Deirdre Ransome 916-319-0491 dransome@cde.ca.gov	Carla Ciarniello 916-323-5054 cciarnie@cde.ca.gov	5	Monterey, San Benito, Santa Clara, Santa Cruz
		7	Fresno, Kings Madera, Mariposa, Merced, Tulare
Lee Murdock 916-445-5736 lmurdock@cde.ca.gov	Mary Brown 916-323-5741 mabrown@cde.ca.gov	11	Los Angeles
Hilary Steinmetz 916-445-5725 hsteinmetz@cde.ca.gov	Mary Brown 916-323-5741 mabrown@cde.ca.gov		State Special Schools County Offices of Education



JACK O'CONNELL
State Superintendent
of Public Instruction

For More Information

Perkins Web page:

www.cde.ca.gov/ci/ct/pk

Main Phone number PAS Office:

916-324-5706

Perkins E-mail Address:

perkins@cde.ca.gov



JACK O'CONNELL
State Superintendent
of Public Instruction



Questions?



JACK O'CONNELL
State Superintendent
of Public Instruction

Thank You