



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

**MASSACHUSETTS
PERKINS IV MANUAL**

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PART I - INTRODUCTION

In Massachusetts, the Massachusetts Department of Elementary and Secondary Education administers the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Public Law 109-270), commonly known as Perkins IV.

School district, public two-year college, consortium, and correctional agency staff should review the official edition of Perkins IV in its entirety and not rely solely on excerpts contained in this Manual. While reasonable efforts have been made to assure accuracy of the information on Perkins IV provided herein, it is recommended that users read the official edition Perkins IV http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=109_cong_bills&docid=f:s250enr.txt.pdf.

Most of the Manual is devoted to Perkins IV Title I local plans and associated allocation grants for school districts, public two-year colleges, and consortia; however, information applicable to Perkins IV Title I competitive grants including those for rural school districts and correctional agencies is included. School district, public two-year college, consortium, and correctional agency staff should refer to the applicable Request for Proposals (RFP) that are available under the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> for specific information RFPs.

Communication between all stakeholders in career and technical education is key for the successful implementation of Perkins IV. Quality technical assistance for each school district, public two-year college, consortium, and correctional agency with career and technical education programs is necessary. **Each school district, public two-year college, consortium, and correctional agency with career and technical education programs that are improved with Perkins IV Title I funds has a liaison in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education.** School district, public two-year college, consortium, and correctional agency staff should contact their liaison for information and assistance. The list of liaisons and contact information is located on the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website www.doe.mass.edu/cte/ under 'CVTE Staff.'

The Massachusetts Department of Elementary and Secondary Education has not endorsed or approved any non-Massachusetts Department of Elementary and Secondary Education products or services referenced in this Manual.

Important Notes:

(1) Several other documents related to the implementation of Perkins IV in Massachusetts are referenced herein. However, this manual is the 'umbrella manual' for Perkins IV in Massachusetts and as such it should be read first.

(2) This manual will be updated as policy guidance on Perkins IV is developed and disseminated by the United States Department of Education. The contents including requirements set forth in this manual are thus subject to change.

PART II - STATE PLAN

The Massachusetts Department of Elementary and Secondary Education submitted a Perkins IV One-Year Transition State Plan to the United States Department of Education on May 3, 2007. It covered fiscal year 2007-2008.

The Massachusetts Department of Elementary and Secondary Education submitted a Perkins IV Five-Year State Plan to the United States Department of Education on April 1, 2008. Two public hearings on the Draft Perkins IV Five-Year State Plan were held.

The Five Year State Plan covers fiscal years 2008 – 2013 and is posted on the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website http://www.careertech.org/uploaded_files/FinalMAPerkinsIVFiveYearState_Plan.pdf.

The Vocational Technical Education Advisory Council to the Massachusetts Board of Elementary and Secondary Education advises the Commissioner and the Board of Elementary and Secondary Education for the purpose of enhancing efforts to improve public education and advance student achievement through Perkins IV, Massachusetts General Law Chapter 74 (Vocational Technical Education) as well applicable initiatives. Additional information on this Council is posted at <http://www.doe.mass.edu/boe/sac/councils/vte.html>.

PART III - SELECTED DEFINITIONS

- Refer to Perkins IV Title I Section 3 for additional definitions pertaining to Perkins IV.
- Refer to the Instructions for School Districts in Reporting Student - Level Data for Career/Vocational Technical Education and the Instructions for the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report for additional definitions pertaining to data reporting under Perkins IV. Both documents are posted under 'Reporting/Data' at <http://www.doe.mass.edu/cte/data/>.
- Refer to the applicable Massachusetts Perkins IV Accountability Workbooks for both secondary and postsecondary education for additional definitions pertaining to core indicators, performance indicators and accountability under Perkins IV. These documents are posted under 'Perkins Act' at <http://www.doe.mass.edu/cte/perkins/>.

Academic and Technical Integration: The term academic and technical integration (or embedded academics) means that academic knowledge and skills are embedded in the technical curriculum and instruction. The challenge is for educators to identify, appropriately teach, and assess student acquisition of the academic knowledge and skills that are embedded. (*See Strand 3: Embedded Academic Knowledge and Skills in each of Massachusetts 46 Vocational Technical Education Frameworks* <http://www.doe.mass.edu/cte/frameworks/>.)

Administration: means activities necessary for the proper and efficient performance of the grant including the supervision of such activities. The United States Department of Education requires that the **combined expenditures proposed for both indirect and direct administrative costs** in a Perkins Title I Grant when taken together not exceed **5%** of the total grant amount. The administrative cost categories (**functions** that should be considered as a direct administrative cost in calculating the **5%** ceiling) are:

- Developing the Local Plan.
- Supervising Local Plan activities.
- Supervising Perkins-funded staff.
- Assuring compliance with applicable Federal laws.
- Supporting and developing local data systems for Perkins. (This does not include data collection and analysis.)

All Aspects of the Industry: This term means occupational *safety & health, technical, embedded academic, employability, management & entrepreneurship*, and *technological* knowledge and skills that should be included in curricula for career and technical education programs under Perkins IV. The Massachusetts Vocational Technical Education Frameworks <http://www.doe.mass.edu/cte/frameworks/> are based on all aspects of the industry.

Apprenticeship Program: Refer to the definition of registered apprenticeship program.

Articulation Agreement: In Perkins IV, the term ‘articulation agreement’ means a written commitment: (A) that is agreed-upon at the State level or approved annually by the lead administrators of— (i) a secondary institution and a postsecondary educational institution; or (ii) a sub-baccalaureate degree granting postsecondary educational institution and a baccalaureate degree granting postsecondary educational institution; and (B) to a program that is: (i) designed to provide students with a non-duplicative sequence of progressive achievement leading to technical skill proficiency, a credential, a certificate, or a degree; and (ii) linked through credit transfer agreements between the 2 institutions described in clause (i) or (ii) of subparagraph (A) (as the case may be).

Career Plan: A Career Plan is a comprehensive, formal written plan (that learners use alone or with the help of others) that relates learning to career goals. The Career Plan is based on both formal and informal assessment and should include areas in which a learner needs to increase knowledge and skills to reach documented goals. A Career Plan is designed to facilitate transition from high school to future learning and employment. The Career Plan may be thought of as both an instrument and a process for monitoring one’s career development. As an instrument, a Career Plan provides a place to organize and record progress related to personal, educational, and career and labor market information. As a process, it encourages learners to use the past and present in goal setting and planning. In either case, a Career Plan should be revisited and modified periodically. The Career Plan would reference articulation agreements, which are connected to the plan. Additional information on Career Plans including the Revised Massachusetts Career Plan Model is posted on the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website under ‘Career Development’ at <http://www.doe.mass.edu/cd/plan/>.

Career and Technical Education Program: Refer to the Massachusetts Perkins IV Career and Technical Education Program Checklist found in Appendix A of this manual for the definition.

Career/Vocational Technical Student Organizations: These organizations serve students enrolled in career and technical education programs by engaging students in a variety of career development and leadership activities. They are assisted with Perkins IV Title I funds especially with respect increasing the participation and success of students who are members of special populations. The organizations in Massachusetts are Business Professionals of America (BPA), Distributive Education Clubs of America (DECA), FFA - An Organization for Students Studying Agriculture (FFA), Health Occupations Students of America (HOSA), and Skills USA.

Career/Vocational Technical Education Graduate Follow-up Report (database): This report is required from school districts that receive Perkins IV funds. The Student Information Management System (SIMS) does not collect student-level data beyond grade 12, therefore this report is required. Note that the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report captures graduate follow-up data from public two-year colleges and the Perkins Postsecondary Consortium. The Chapter 74 Vocational Technical Education Postsecondary and Postgraduate Report captures graduate follow-up data from school districts that have Chapter 74-approved vocational technical education programs on the postsecondary level.

Chapter 74 Vocational Technical Education Postsecondary and Postgraduate Report: This report is required from school districts that have Chapter 74-approved vocational technical education programs on the postsecondary level. Note that the Student Information Management System (SIMS) does not collect student-level data beyond grade 12, therefore this report is required.

Chapter 74-Approved Vocational Technical Education Program: A Chapter 74-approved vocational technical education program is a program that is approved by the Massachusetts Department of Elementary and Secondary Education pursuant to Massachusetts General Law Chapter 74 and the Vocational Technical Education Regulations, and that meets the definition of career and technical education contained in the Carl D. Perkins Career and Technical Education Improvement Act of 2006 P.L. 109-270 (Perkins IV). The Chapter 74 Vocational Technical Education Program Directory at <http://www.doe.mass.edu/cte/programs/> lists the approved programs by district/school. In addition, individual ‘School Profiles’ on the Massachusetts Department of Elementary and Secondary Education website <http://profiles.doe.mass.edu/> lists Chapter 74-approved vocational technical education programs by district.

Core Academic Subjects: The core academic subjects are those contained in Section 9101 of the Elementary and Secondary Education Act, as amended by the No Child Left Behind Act: English, Reading or Language Arts, Mathematics, Science, Foreign Languages, Civics and Government, Economics, Arts, History, and Geography.

Core Indicators: These are indicators of performance under Perkins IV Title I. Refer to Part VI of this Manual for the definitions. Refer also to the applicable Massachusetts Perkins IV Accountability Workbook (Secondary) or (Postsecondary) for additional definitions pertaining to core indicators and accountability under Perkins IV Title I.

Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color National Origin, Sex, and Handicap in Vocational Education Programs - 34 CFR, Part 100, Appendix B): These federal Regulations are applicable to career and technical education programs in school districts/public two-year colleges/consortia that receive federal funds.

Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report: This is the annual data report that is required to be submitted to the Massachusetts Department of Elementary and Secondary Education by public two-year colleges and the Perkins Postsecondary/Consortium. Note that the Student Information Management System (SIMS) does not collect student-level data beyond grade 12, therefore this report is required.

Non-Chapter 74 Career and Technical Education Program: In Massachusetts, a program that is not a Chapter 74-approved vocational technical education program, but does meet the definition of career and technical education contained in the Carl D. Perkins Career and Technical Education Improvement Act of 2006 P.L. 109-270 (Perkins IV) is a non-Chapter 74 career and technical education program.

Nontraditional by Gender Career: The term nontraditional by gender career means a career for which individuals from one gender comprise less than 25 percent of the individuals employed in the career. Under Perkins IV, Massachusetts uses the lists of nontraditional careers produced by the National Alliance for Partnerships Equity (NAPE) and the Massachusetts Supplement to the NAPE Nontraditional by Gender Lists. The lists and supplement are available on the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website <http://www.doe.mass.edu/cte/ntbg/>.

Perkins IV Title I: (‘Career and Technical Education Assistance’): Perkins IV Title I is the source of funds for Perkins allocation grants and other grants to improve career and technical education programs on the secondary and postsecondary levels. It is also the source of Perkins State leadership funds that are used to improve career and technical education programs in correctional agencies, support career/vocational technical education student organizations, especially with respect to increasing the participation of students who are members of special populations, and support activities and services to increase the enrollment and retention in programs that prepare students for careers nontraditional for their gender. Statewide professional development, technical assistance and data collection, and analysis are funded from Perkins IV Title I.

Perkins I Title III: ('General Provisions'): Perkins IV Title III contains Federal and State administrative provisions.

Perkins Performance Years:

Perkins Performance Year 1 is 2007-2008

Perkins Performance Year 2 is 2008-2009

Perkins Performance Year 3 is 2009-2010

Perkins Performance Year 4 is 2010-2011

Perkins Performance Year 5 is 2011-2012

Perkins Performance Year 6 is 2012-2013

Postsecondary Career and Technical Education Program Concentrator: The term used to denote a career and technical education program participant who has earned 12 or more college credits.

Postsecondary Career and Technical Education Program Participant: The term used to denote a student who has been formally admitted (matriculated) into a specific career and technical education program and is enrolled in at least one for-credit course for the fall semester.

Registered Apprenticeship Program: A postsecondary program that is registered with the Massachusetts Division of Apprentice Training.

Program of Study: The program of study under Perkins IV must include (1) both secondary and postsecondary elements, (2) coherent and rigorous content aligned with challenging academic standards and relevant career and technical content in a coordinated, non-duplicative progression of courses that align secondary education with postsecondary education to adequately prepare students to succeed in postsecondary education; and may include the opportunity for secondary education students to participate in dual or concurrent enrollment programs or other ways to acquire postsecondary education credits.

Program of Study Grid: A Program of Study Grid is a career-planning tool that outlines the recommended courses, work-based learning, and other activities leading to a degree or certificate, including a certificate from a registered apprenticeship program.

Public Two-Year College: In Massachusetts, the fifteen community colleges, Benjamin Franklin Institute of Technology, and Quincy College are public two-year colleges.

Secondary Career and Technical Education Program Concentrator: The term used to denote a student at the secondary level who was enrolled in a career and technical education program for two years. In Massachusetts, the Student Information Management System (SIMS) is used to capture data on concentrators on the secondary level. The students reported in SIMS as enrolled in a career and technical education program for two consecutive years are concentrators.

Secondary Career and Technical Education Program Participant: The term used to denote a student at the secondary level who was enrolled for one year in any career and technical education program. In Massachusetts, the Student Information Management System (SIMS) is used to capture data on participants on the secondary level. The students reported in SIMS as enrolled in a career and technical education program in October and June of the same school year are participants.

SIMS (Student Information Management System): Student-level data collection system that allows the Massachusetts Department of Elementary and Secondary Education to collect and analyze more accurate and comprehensive information, to meet federal and state reporting requirements, and to inform policy and programmatic decisions. Note that the Career/Vocational Technical Education Graduate Follow-up

Report is used to report graduate follow-up data on students because SIMS does not collect student-level data beyond grade 12.

Special Populations - The special populations identified in Perkins IV Title I are:

individual with a disability: The term ‘individual with a disability’ means an individual with any disability (as defined in section 3 of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102)).

individual who is economically disadvantaged: The term “economically disadvantaged” means individuals from economically disadvantaged families, including foster children. The term is also applied to students enrolled in public two-year colleges and school districts who are the recipients of PELL grants.

individual who is economically disadvantaged: The term “economically disadvantaged” means individuals from economically disadvantaged families, including foster children. The term is also applied to students enrolled in public two-year colleges and school districts who are the recipients of PELL grants.

individual with limited English proficiency: The term ‘individual with limited English proficiency’ means a secondary school student, an adult, or an out-of-school youth, who has limited ability in speaking, reading, writing, or understanding the English language, and—(A) whose native language is a language other than English; or (B) who lives in a family or community environment in which a language other than English is the dominant language.

individual preparing for nontraditional field: The term ‘individual preparing for nontraditional field’ means a student preparing for an occupation or field of work in a nontraditional field. The term ‘nontraditional field’ means occupations or field of work, including careers in computer science, technology, and other current and emerging high skill occupations, for which individuals from one gender comprise less than 25 percent of the individuals employed in each such occupation or field of work.

single parent: The term “single parent” means an unmarried parent. The term “single parent” includes single pregnant women.

displaced homemaker: The term ‘displaced homemaker’ means an individual who—
A)(i) has worked primarily without remuneration to care for a home and family, and for that reason has diminished marketable skills; (ii) has been dependent on the income of another family member but is no longer supported by that income; or (iii) is a parent whose youngest dependent child will become ineligible to receive assistance under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.) not later than 2 years after the date on which the parent applies for assistance under such title; and (B) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

Sufficient Size, Scope and Quality

Sufficient Size: the activities and services are appropriate in duration in order to achieve intended outcomes and produce measurable results

Sufficient Scope: the activities and services are appropriate in depth and sequence in order to achieve intended outcomes and produce measurable results

Sufficient Quality: the activities and services are selected and designed using the results of research, data analysis and evaluation, which provide evidence that the activities and services will achieve intended outcomes and produce measurable results.

Technical Course: a course that provides individuals with occupational safety and health, and/or technical, and/or embedded academic, and/or employability, and/or management & entrepreneurship, and/or technological knowledge and skills required for a specific career or cluster of careers.

Vocational Technical Education Advisory Council to the Massachusetts Board of Elementary and Secondary Education: This Council is mandated by Massachusetts law (Chapter 15: Section 1G). The Council advises the Commissioner of Elementary and Secondary Education and the Board of Elementary and Secondary Education that includes to Commissioner of Higher Education for the purpose of enhancing efforts to improve public vocational technical education under Massachusetts General Law Chapter 74 and the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Public

Law 109-270). The Council meets at least four times per year per the schedule posted at <http://www.doe.mass.edu/news/news.aspx?id=5010>. The membership list is posted at <http://www.doe.mass.edu/boe/sac/councils/vte.html>.

PART IV - PERKINS IV TITLE I - ALLOCATION COMPUTATIONS (Secondary and Postsecondary)

Perkins IV Citations: Title I Section 131, Section 132

The formulas used for computing Perkins IV Title I allocations for school districts and public two-year are set forth in detail in Perkins IV Title I Section 131 (secondary) and Section 132 (postsecondary) and thus they are not reprinted in this Manual.

Pursuant to Perkins IV Title I Section 112 (a), the Massachusetts Department of Elementary and Secondary Education distributes by formula allocations a minimum of 85 percent of Perkins IV Title I funds to school districts and public two-year colleges with programs that meet the definition of career and technical education contained in Perkins IV and that have Massachusetts Department of Elementary and Secondary Education - approved Perkins IV Local Plan. The funds must be used to improve career and technical education programs.

Secondary Allocations

Perkins IV Citation: Title I Section 131

Minimum Amount - Secondary

In order to submit a Perkins IV Title I Local Plan and apply for a secondary allocation grant, a school district must have been computed by the Massachusetts Department of Elementary and Secondary Education for an allocation of at least \$15,000. A school district that is computed for a secondary allocation of less than \$15,000 may form or join a consortium with one or more school districts and join computed allocations to meet the \$15,000 minimum. A waiver of the minimum may be granted by the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education if the school district is: (A) (i) is located in a rural, sparsely populated area; or (ii) is a public charter school operating secondary - level career and technical education programs; and (B) demonstrates that the school district is unable to enter into a consortium. The request for a waiver of the \$15,000 minimum must be made in writing to the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education by **April 15** for the following school year.

Consortium Formation - Secondary

As stated above, the request to form a consortium must be made in writing to the Administrator of the Office for Career/Vocational Technical Education by **April 15** for the following school year. Perkins IV Title I funds provided to a consortium shall be used only for activities and services that are mutually beneficial to all members of the consortium. Funds shall not be provided to individual members of the consortium (as a 'pass-through') for purposes and programs benefiting one member of the consortium. The consortium shall develop a joint Perkins IV Title I Local Plan and single allocation grant application.

Transfer of Allocation - Secondary

A school district may transfer its allocation to another school district that provides program(s) that meet the Perkins IV Title I definition of career and technical education provided that the school district that would receive the allocation funds would provide career and technical education programs to the students from the school district that would provide the funds. For example, a school district that is not a member of a regional vocational technical school district, but sends its students to the regional vocational technical school district for career and technical education programs may propose to transfer its allocation to the regional vocational technical school district.

School districts that wish to transfer funds to another district shall notify the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education by **April 15** for the following school year.

School districts that anticipate receiving transferred funds from another district shall notify the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education by **April 15** for the following school year.

The form (Schedule A) to be used for fund transfer is on the Massachusetts Department of Elementary and Secondary Education - Grants Information website

<http://finance1.doe.mass.edu/Grants/procedure/forms/b.doc>.

Charter Schools - Secondary

A charter school or any other school may request a review by the Massachusetts Department of Elementary and Secondary Education for the purpose of determining whether the school's programs meet the Perkins IV Title I definition of career and technical education. School administrators should contact the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education in writing by **January 15th**, if they wish to have their programs reviewed by the Massachusetts Department of Elementary and Secondary Education to determine if they meet the Perkins IV Title I definition of career and technical education for subsequent fiscal year allocation computations. The Massachusetts Career and Technical Education Program Checklist in the Appendices of this Manual would be used to determine whether the program(s) meet the Perkins IV Title I definition of career and technical education.

Appeals Procedure

Perkins IV Citation: Title I Section 131 (e) (3)

Perkins IV Citation: Title I Section 131 (e) (3) states: "The eligible agency shall establish an appeals procedure for resolution of any dispute arising between a local educational agency and an area career and technical education school or an educational service agency with respect to the allocation procedures described in this section, including the decision of a local educational agency to leave a consortium or terminate a cooperative arrangement."

The appeals procedure established by the Massachusetts Department of Elementary and Secondary Education pursuant to Perkins IV Title I Section 131 (e) (3) is as follows:

Level 1 Review

The superintendent of a school district may request a review of any dispute arising between a school district and a regional vocational technical school district with respect to the allocation procedures in Perkins IV Title I Section 131 (e) (3) including the decision by a school district to leave a consortium by sending a letter giving the details of the dispute to the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education within 30 days of receipt of the computed allocation amount. A letter to the school district with the results of the Level 1 Review will be issued within 30 days.

Level 2 Appeal

The superintendent of a school district may appeal the findings of the Level 1 Review within 60 days of receipt of the results of the Level 1 Review. A letter requesting an appeal hearing must be sent to the Commissioner of Elementary and Secondary Education, Massachusetts Department of Elementary and Secondary Education. The request must include a statement of the issues being appealed alleging a violation of state or federal law, regulations or guidelines governing Perkins IV, including an itemization of the matters of fact and law upon which the applicant bases the appeal; copies of all documents, correspondence, data, exhibits and other information which the school district intends to introduce at the hearing to support the school district's position; a list of witnesses whose testimony will be introduced.

The hearing, conducted by a hearing officer designated by the Commissioner, takes place within thirty days and with at least seven calendar days notice to the school district. The hearing officer will issue a written decision of the appeal, no later than ten calendar days after the hearing.

Reserve Funds

Perkins IV Citation: Title I Section 112 (c)

Pursuant to Perkins IV Title I Section 112 (c) the Massachusetts Department of Elementary and Secondary Education reserves a portion of the Perkins IV Title I funds that are available for distribution. (allocation) for grants to school districts in:

- (1) rural areas;
- (2) areas with high percentages of career and technical education students; and
- (3) areas with high numbers of career and technical education students

Postsecondary Allocations

Perkins IV Citation: Title I Section 132

Minimum Amount - Postsecondary

In order to submit a Perkins IV Title I Local Plan and apply for a postsecondary allocation grant, a public two-year college or school district must have been computed by the Massachusetts Department of Elementary and Secondary Education for an allocation of at least \$50,000. A public two-year college or school district that is computed for a postsecondary allocation of less than \$50,000 may form or join a consortium with one or more public two-year colleges and/or school districts and join computed allocations to meet the minimum. A waiver of the minimum may be granted by the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education only if the college or school district is located in a rural, sparsely populated area. The request for a waiver of the \$50,000 minimum must be made in writing to the Administrator of the Office for Career/Vocational Technical Education in the Massachusetts Department of Elementary and Secondary Education by **April 15** for the following school/college year.

Consortium Formation - Postsecondary

As stated above, the request to form a consortium must be made in writing to the Administrator of the Office for Career/Vocational Technical Education by **April 15** for the following school/college year. Perkins IV Title I funds provided to a consortium shall be used only for activities and services that are mutually beneficial to all members of the consortium. Funds may not be provided to individual members of the consortium (as a 'pass-through') for purposes and programs benefiting one member of the consortium. The consortium shall develop a joint Perkins IV Title I Local Plan and single grant application.

PART V - PERKINS IV TITLE I - LOCAL PLANS and ALLOCATION GRANTS (Secondary and Postsecondary)

Perkins IV Citations: Title I Section 134

In response to a Request for Proposals (RFP)* posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under 'Entitlement/Allocation Requests for Proposals' a school district, public two-year college, or consortium desiring Perkins IV Title I allocation funds shall submit a Perkins IV Title I Local Plan to the Massachusetts Department of Elementary and Secondary Education. The RFP provides specific information on each grant program, including but not limited to eligibility, purpose, priorities, available funding, grant duration, due date, Massachusetts Department of Elementary and Secondary Education contact person, submission, and required forms. Many school districts and public two-year colleges and a small number of consortia submitted Perkins IV Title I One-Year Transitional Local Plans at the

beginning of Perkins IV and then submitted Perkins IV Title I Five-Year Local Plans. The required elements of each Plan are contained in Perkins IV Title I Section 134.

School districts, public two-year colleges, consortia with Perkins IV Title I Local Plans annually submit a Standard Contract Form and Application for Program Grants (grant application) to the Massachusetts Department of Elementary and Secondary Education in response to the Request for Proposals (RFP). The Standard Contract Form and Application for Program Grants is the document used for submitting the budget for the individual grant. The RFP includes a link to the Standard Contract Form and Application for Program Grants. Note that for allocation grants to school districts for local plan allocation grants on the secondary level a workbook in EXCEL based on the Standard Contract Form and Application for Program Grants is required. The workbook in EXCEL is submitted by school districts through the Massachusetts Department of Elementary and Secondary Education Security Portal. For public two-year colleges, the Standard Contract Form and Application for Program Grants is a paper document that is submitted by email and regular mail according to the instructions in the RFP.

* The RFP for Perkins secondary allocation grants is titled ‘Perkins Secondary Allocation Grant’ and has the Fund Code 400, and the RFP for Perkins postsecondary allocation grants is titled ‘Perkins Postsecondary Allocation Grant’ and has the Fund Code 401.

The Massachusetts Department of Elementary and Secondary Education reviews Perkins IV Title I Local Plans and associated grant applications (Standard Contract Form and Application for Program Grants) for compliance prior to issuing grant awards.

School districts, public two-year colleges, and consortia with Perkins IV Title I Local Plans must submit amendments to Local Plans and grant applications as applicable, local improvement plans as required, an Annual Perkins Report on local improvement plans, enrollment and accountability data, and set core indicator performance levels with the Massachusetts Department of Elementary and Secondary Education. School districts, public two-year colleges, and consortia with Perkins IV Title I Local Plans are provided technical assistance and monitoring by the Massachusetts Department of Elementary and Secondary Education.

Legal Claim of Expenses under Perkins IV Grants:

Each RFP includes a statement to the effect that expenses can only be charged to the grant only from the date of final Massachusetts Department of Elementary and Secondary Education approval of the Standard Contract Form and Application for Program Grants.

Example: “Standard Contract Form and Application for Program Grants submitted or approved after September 1, 2011 can legally claim expenses to the grant only from the date of final Massachusetts Department of Elementary and Secondary Education approval.”

All expenditures of Perkins IV allocation grant funds must be detailed in the Perkins IV Local Plan/Programmatic Amendment and applicable Standard Contract Form and Application for Program Grants/Amendment, and be approved by the Massachusetts Department of Elementary and Secondary Education prior to implementation.

Consequences of Failing to File Information and Data on Time

Failure to file the Perkins IV Five-Year Local Plan, Annual Perkins Report, Standard Contract Form and Application for Program Grants, enrollment and accountability data, and set core indicator performance levels with the Massachusetts Department of Elementary and Secondary Education (or corrected/revised Plans, supplementary materials or application) by the due date(s) may result in the school district, public two-year college, or consortium not receiving Perkins IV Title I allocation funds. School districts, public two-year colleges and consortia can legally claim expenses to a grant only from the date of final

Massachusetts Department of Elementary and Secondary Education approval of the Standard Contract Form and Application for Program Grants.

Uses of Perkins IV Allocation Grant Funds

The United States Department of Education requires that the combined expenditures proposed for both indirect and direct administrative costs in a Perkins allocation grant when taken together not exceed 5% of the total grant amount. The administrative cost categories (functions that should be considered as a direct administrative cost in calculating the 5% ceiling) are:

- Developing the Local Plan.
- Supervising Local Plan activities.
- Supervising Perkins-funded staff.
- Assuring compliance with applicable Federal laws.
- Supporting and developing local data systems for Perkins. (This does not include data collection and analysis.)

Perkins IV allocation grant funds shall be used to improve career and technical education programs.

Perkins IV allocation grant funds must supplement, and not supplant local/state funds.

Upon approval from the Massachusetts Department of Elementary and Secondary Education, Perkins IV requires that school districts/public two-year colleges/consortia use Perkins IV allocation grant funds (or other funds) **for the following nine uses detailed below (as outlined in Section 135 of the Act)**. *(If funds other than Perkins IV funds are utilized to address these requirements, the school district/ public two-year college/consortia must be able to document the funds to the satisfaction of the Massachusetts Department of Elementary and Secondary Education.)*

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—

(1) strengthen the academic and career and technical skills of students participating in career and technical education programs, by strengthening the academic and career and technical education components of such programs through the **integration of academics** with career and technical education programs through a coherent sequence of courses, such as career and technical programs of study described in section 122(c) (1) (A), to ensure learning in—

(A) the core academic subjects (as defined in section 9101 of the Elementary and Secondary Education Act of 1965); and

(B) career and technical education subjects;

(2) **link career and technical education at the secondary level and career and technical education at the postsecondary level**, including by offering the relevant elements of not less than 1 career and technical program of study described in section 122(c)(1)(A);

(3) provide students with strong experience in and understanding of **all aspects of an industry**, which may include work-based learning experiences;

(4) develop, improve, or expand the **use of technology** in career and technical education, which may include—

(A) training of career and technical education teachers, faculty, and administrators to use technology, which may include distance learning;

(B) providing career and technical education students with the academic and career and technical skills (including the mathematics and science knowledge that provides a strong basis for such skills) that lead to entry into the technology fields; or

(C) encouraging schools to collaborate with technology industries to offer voluntary internships and mentoring programs, including programs that improve the mathematics and science knowledge of students;

- (5) provide **professional development programs** that are consistent with section 122 to secondary and postsecondary teachers, faculty, administrators, and career guidance and academic counselors who are involved in integrated career and technical education programs, including—
- (A) in-service and pre-service training on—S. 250—53
 - (i) effective integration and use of challenging academic and career and technical education provided jointly with academic teachers to the extent practicable;
 - (ii) effective teaching skills based on research that includes promising practices;
 - (iii) effective practices to improve parental and community involvement; and
 - (iv) effective use of scientifically based research and data to improve instruction;
 - (B) support of education programs for teachers of career and technical education in public schools and other public school personnel who are involved in the direct delivery of educational services to career and technical education students, to ensure that such teachers and personnel stay current with all aspects of an industry;
 - (C) internship programs that provide relevant business experience; and
 - (D) programs designed to train teachers specifically in the effective use and application of technology to improve instruction;
- (6) develop and implement **evaluations of the career and technical education programs** carried out with funds under this title, including an assessment of how the needs of special populations are being met;
- (7) **initiate, improve, expand, and modernize** quality career and technical education programs, including relevant technology;
- (8) provide services and activities that are of **sufficient size, scope, and quality** to be effective; and
- (9) provide activities to prepare special populations, including single parents and displaced homemakers who are enrolled in career and technical education programs, for **high skill, high wage, or high demand occupations** that will lead to self-sufficiency.

After the nine (9) required uses are appropriately addressed, Perkins allocation grant funds may be used for the following upon approval from the Massachusetts Department of Elementary and Secondary Education:

Permissive Uses of Perkins Allocation Grant Funds (as outlined in Section 135 of the Act):

- (c) PERMISSIVE. —Funds made available to an eligible recipient under this title may be used—
- (1) to involve parents, businesses, and labor organizations as appropriate, in the design, implementation, and evaluation of career and technical education programs authorized under this title, including establishing effective programs and procedures to enable informed and effective participation in such programs;
 - (2) to provide career guidance and academic counseling, which may include information described in section 118, for students participating in career and technical education programs, that—
 - (A) improves graduation rates and provides information on postsecondary and career options, including baccalaureate degree programs, for secondary students, which activities may include the use of graduation and career plans; and
 - (B) provides assistance for postsecondary students, including for adult students who are changing careers or updating skills;
 - (3) for local education and business (including small business) partnerships, including for—S. 250—54
 - (A) work-related experiences for students, such as internships, cooperative education, school-based enterprises, entrepreneurship, and job shadowing that are related to career and technical education programs;
 - (B) adjunct faculty arrangements for qualified industry professionals; and
 - (C) industry experience for teachers and faculty;
 - (4) to provide programs for special populations;
 - (5) to assist career and technical student organizations;
 - (6) for mentoring and support services;

- (7) for leasing, purchasing, upgrading or adapting equipment, including instructional aids and publications (including support for library resources) designed to strengthen and support academic and technical skill achievement;
- (8) for teacher preparation programs that address the integration of academic and career and technical education and that assist individuals who are interested in becoming career and technical education teachers and faculty, including individuals with experience in business and industry;
- (9) to develop and expand postsecondary program offerings at times and in formats that are accessible for students, including working students, including through the use of distance education;
- (10) to develop initiatives that facilitate the transition of sub-baccalaureate career and technical education students into baccalaureate degree programs, including—
 - (A) articulation agreements between sub-baccalaureate degree granting career and technical education postsecondary educational institutions and baccalaureate degree granting postsecondary educational institutions;
 - (B) postsecondary dual and concurrent enrollment programs;
 - (C) academic and financial aid counseling for sub-baccalaureate career and technical education students that informs the students of the opportunities for pursuing a baccalaureate degree and advises the students on how to meet any transfer requirements; and
 - (D) other initiatives—
 - (i) to encourage the pursuit of a baccalaureate degree; and
 - (ii) to overcome barriers to enrollment in and completion of baccalaureate degree programs, including geographic and other barriers affecting rural students and special populations;
- (11) to provide activities to support entrepreneurship education and training;
- (12) for improving or developing new career and technical education courses, including the development of new proposed career and technical programs of study for consideration by the eligible agency and courses that prepare individuals academically and technically for high skill, high wage, or high demand occupations and dual or concurrent enrollment opportunities by which career and technical education students at the secondary level could obtain postsecondary credit to count towards an associate or baccalaureate degree;
- (13) to develop and support small, personalized career-themed learning communities; S. 250—55
- (14) to provide support for family and consumer sciences programs;
- (15) to provide career and technical education programs for adults and school dropouts to complete the secondary school education, or upgrade the technical skills, of the adults and school dropouts;
- (16) to provide assistance to individuals who have participated in services and activities under this Act in continuing their education or training or finding an appropriate job, such as through referral to the system established under section 121 of Public Law 105–220 (29 U.S.C. 2801 et seq.);
- (17) to support training and activities (such as mentoring and outreach) in nontraditional fields;
- (18) to provide support for training programs in automotive technologies;
- (19) to pool a portion of such funds with a portion of funds available to not less than 1 other eligible recipient for innovative initiatives, which may include—
 - (A) improving the initial preparation and professional development of career and technical education teachers, faculty, administrators, and counselors;
 - (B) establishing, enhancing, or supporting systems for—
 - (i) accountability data collection under this Act; or
 - (ii) reporting data under this Act;
 - (C) implementing career and technical programs of study described in section 122(c) (1) (A); or
 - (D) implementing technical assessments; and
- (20) to support other career and technical education activities that are consistent with the purpose of this Act.

Unallowable Uses of Perkins IV Allocation Grant Funds:

All proposed expenditures of Perkins IV allocation grant funds must be detailed in the Perkins IV Local Plan/Programmatic Amendment and applicable Standard Contract Form and Application for Program Grants/Amendment, and be approved by the Massachusetts Department of Elementary and Secondary

Education prior to implementation. The following list includes, but is not limited to, expenditures that would not be approved. School district, public two-year college, consortium staff are advised to discuss questions related to expenditures with their liaison in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education as there are additional expenditures prohibited by federal or state law, regulation or policy.

- indirect and direct **administrative costs** that when taken together **exceed 5%**
- any expenditure that would **supplant** local/state funds
- **required** programs and services (e.g., new teacher induction program)
- any expenditure that is **not related to improvement** of career and technical education programs or improvement of the outcomes for students enrolled in those programs
- any expenditure for professional development that does not meet the criteria set forth in Section XIII of this Manual. One-day or **short-term workshops** or conferences **without follow-up activities and/or deliverables** are not fundable with Perkins IV allocation funds.
- any **unnecessary** or **unreasonable** expenditures
- any expenditure for college course **tuition** required for teacher licensure
- any expenditure for **entertainment** including amusement, diversion, and social activities and any costs directly associated with such costs (such as tickets to shows or sports events, meals, lodging, rentals, transportation, and gratuities)
- purchase/lease of **automobiles**
- **school construction**
- any expenditure for **promotional items** and memorabilia, including jackets, models, gifts, and souvenirs, etc.
- consumable goods such as paper, printer ink, compressed air/gases
- remedial courses
- support of career/vocational technical student organizations shall **not** include:
 - lodging, feeding, conveying, or furnishing transportation to conventions;
 - purchase of supplies, jackets, and other effects for students' personal ownership;
 - cost of non-instructional activities such as athletic, social, or recreational events;
 - printing and disseminating non-instructional newsletters;
 - purchase of awards for recognition of students, advisors, and other individuals;
 - payment of individual student membership dues
- any expenditure prohibited by federal or state law, regulation, or policy
- out-of-state travel (without Office for Career/Vocational Technical Education approval)

Frequently Asked Expenditure Questions/Topics

School district/public two-year college/consortium staff are advised to discuss questions related to expenditures with their liaison in the Massachusetts Department of Elementary and Secondary Education Office for Career/Vocational Technical Education. (The list of liaisons by district is accessible from a link on the homepage of the Office for Career/Vocational Technical Education. The direct link to the list is <http://www.doe.mass.edu/cte/liaison.html>)

The following list includes, but is not limited to, expenditures that the Massachusetts Department of Elementary and Secondary Education receives the most questions.

- **Food** may be an allowable expenditure under Perkins IV allocation grants for professional development activities and other program improvement activities such as program advisory committee meetings when the **food is necessary, and the cost is reasonable**. Food for professional development activities and other program improvement activities may be allowable when the activity overlaps a mealtime, or for simple refreshment when it would be impractical or relatively inconvenient for the participants to purchase sustenance. For example, an all day professional development session may require a simple lunch and an afternoon snack to avoid the need for participants to leave the premises disrupting the work

and missing the lunchtime speaker. Food for banquets, award ceremonies, goodwill gestures, etc. is not allowable.

- **Fees** paid for an individual student such as dues, registration fees, license/certification fees are not allowable – this includes but is not limited to career/vocational technical education student organization dues, transportation, lodging, registration, and uniforms for the individual student. **Whole school career/vocational technical education student organization participation dues may be allowable if all students benefit from services or activities that are instructional in nature and the expenditure is approved by the Massachusetts Department of Elementary and Secondary Education.**

- **Transportation of Students:** Perkins IV allocation grant funds may not be used to pay by giving cash, credit card, voucher etc. to an individual student enrolled in a career/vocational technical education program to take a bus, plane, etc. to a cooperative education site, internship site, college, career/vocational technical education student organization event, etc.

Perkins IV allocation grant funds may not be used to transport students for career/vocational technical education student organization events.

Perkins IV allocation grant funds may be used to transport students enrolled in career/vocational technical education programs on field trips including college/registered apprenticeship program visits.

- **Stipends** for staff to attend meetings and/or professional development events are not allowable, unless there are follow-up activities and/or deliverables.

- **Stipends** for students are not allowable for the sole purpose of paying students to learn, such as would be the case when providing a stipend to a student to perform a hospital internship or providing a stipend to a student to work for a company on cooperative education. Stipends may be allowable for students to perform work directly related to career and technical education program improvement in the school district/public two-year college, like any other qualified person to the extent allowable by state and federal employment laws, and providing there are no supplanting issues such as the student replacing a staff person in the placement office who was paid with local funds to analyze graduate follow-up data. Example: A stipend for a student redesigning the school's career and technical education program Website during the summer under the supervision of appropriate staff, in order to improve accessibility for students who may be sight impaired, may be allowable.

Example: A stipend for a college student to peer tutor other students in career and technical education programs, under the supervision of appropriate staff, that would result in career and technical education program improvement, via the tutor identifying common student needs that may be translated into program improvement, resulting in improved core indicator of performance by the public two-year college may be allowable.

The selection of students for work must be in compliance with applicable school district/public two-year college policies, and include provisions for equal opportunity.

- **New technical education teaching** positions may be allowable only for a new program or program component. A program or program component is considered new for up to three years. After that time, the teacher must be paid with non-Perkins IV funds.

- **Occupational Certifications and Licenses for Students:**

Perkins IV allocation grant funds may be used for occupational certifications and licenses granted to students enrolled in a career/vocational technical education programs only under the following conditions:

- the certification or license is preceded by a technical assessment, which the student has passed, and
- the technical assessment fee and the certification or license fee are not separate fees (if the certification or license fee is a stand-alone fee, the student should cover that fee)

□ there is equitable and non-discriminatory criteria used by the district to determine which certifications and licenses are funded, and

□ funding for this purpose has been pre-approval by the ESE-Office for Career/Vocational Technical Education. *(Note: In considering whether to approve such expenditure, the Massachusetts Department of Elementary and Secondary Education would consider whether the expenditure during one fiscal year would limit the funds remaining in the allocation grant that could be used for necessary program improvement and improvement of the core indicator outcomes for students enrolled.)*

• **Routine office/program supplies** (such as books, pens, paper, workbooks, sandpaper) are not allowable unless they supplement, and do not supplant local/state funds, and unless they would be used for career and technical education program improvement.

• **Staff funded partially with Perkins IV Title I allocation grant funds** or from multiple grants may be allowable when the employee divides his/her time between more than one federally supported grant program (for example Special Education and Perkins IV) or between more than one Perkins IV grant, provided that records of the time distribution between grant projects are kept.

• **Vehicle Lease/Purchase and Lease to Purchase:**

Note that the lease/purchase or lease to purchase of automobiles for any purpose is an unallowable use of Perkins IV allocation grant funds.

Lease/purchase or lease to purchase of trucks may be an allowable use of Perkins allocation grant funds. Note that for safety reasons students shall not be transported in the back of trucks. In considering whether to approve expenditure for the purchase of a truck, the Massachusetts Department of Elementary and Secondary Education would consider whether the purchase during one fiscal year would limit the funds remaining in the grant that could be used for other program improvement purposes. It may be that lease to purchase would be the approved option in that funds would be available for other approvable purposes during the fiscal year.

Vans/busses may not be leased/purchased or leased to purchase with Perkins allocation grant funds for the primary purpose of transporting students/staff to cooperative education sites.

Vans/busses may not be leased/purchased or leased to purchase with Perkins allocation grant funds for the primary purpose of transporting students/staff to career/vocational technical education student organization events.

Vans/busses/trucks purchased/leased or leased to purchase with Perkins allocation grant funds may be used for students not enrolled in the actual career/vocational technical education program (but enrolled in other career/vocational technical education programs) when the vehicle is not in use for students enrolled in the actual career/vocational technical education program for which the vehicle was intended to be used. Vans/busses/trucks purchased/leased or leased to purchase with Perkins allocation grant funds may not be used for non-career/vocational technical education activities such as transportation of sport teams.

Vans/busses may be purchased/leased or leased to purchase with Perkins allocation grant funds when the van/bus is to be used to improve more than one career/vocational technical education program through more than one activity in order to make the expenditure cost-effective. Example: Van is leased to provide field trips, transportation to internship/job shadowing sites for students in multiple career/vocational technical education programs separately or together.

Supplement, Not Supplant Provision

(Perkins IV Citation: Title I Section 311)

Funds made available under Perkins IV shall supplement, and shall not supplant, local/state funds. Perkins IV funds are to be used to improve career and technical education programs. **The expectation is that local/state funds would provide for the infrastructure, staff, supplies/materials, staff travel, equipment, etc.** An example of supplanting might be a school district/public two-year college moving the salary of a teacher from the local payroll to the Perkins IV payroll. Purchase of textbooks with Perkins IV by school districts might constitute supplanting in that textbooks are part of what schools ordinarily purchase with local funds. Office supplies such as paper are also generally part of most school

district/ public two-year college local budgets, and in some school districts and public two-year colleges the costs are recovered by indirect costs in grants.

Note that Perkins IV funds would not supplant local/state funds when the costs of, for example paper, are tied directly to a program improvement either required or permitted by Perkins IV, and that was not previously covered by local/state funds. An example would be the paper used for printing professional development materials, for staff training related to preparing students for careers that are nontraditional for their gender.

(Note: Each situation is different and there is no one size fits all test for supplanting. School district, public two-year college, and consortium staff should discuss supplanting issues internally, and seek technical assistance from their liaisons in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education as necessary.)

PART VI - PERKINS IV TITLE I - CORE INDICATORS

Perkins IV Title I Citations: Section 3, Section 113, Section 123, Section 134 (b) (2), Section 134 (b) (8), Section 134 (b) (9), Section 135 (b) (9). Note: See Part XVII for performance indicators under Perkins IV.

Secondary Level Core Indicators

Perkins IV Title I Citation: Section 113 (b) (2)

The secondary level core indicators quoted directly from Perkins IV Title I Section 113 (b) (2) (A) are as follows:

1S1 and **1S2** student attainment of challenging academic content standards and student academic achievement standards, as adopted by a State in accordance with section 1111(b) (1) of the Elementary and Secondary Education Act of 1965 and measured by the State determined proficient levels on the academic assessments described in section 1111(b) (3) of such Act

2S1 student attainment of career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry recognized standards, if available and appropriate

3S1 student rates of attainment of each of the following:

(I) A secondary school diploma.

(II) A General Education Development (GED) credential, or other State-recognized equivalent (including recognized alternative standards for individuals with disabilities).

(III) A proficiency credential, certificate, or degree, in conjunction with a secondary school diploma (if such credential, certificate, or degree is offered by the State in conjunction with a secondary school diploma).

4S1 student graduation rates (as described in section 1111(b)(2)(C)(vi) of the Elementary and Secondary Education Act of 1965)

5S1 student placement in postsecondary education or advanced training, in military service, or in employment

6S1 student participation in career and technical education programs that lead to nontraditional careers

6S2 student completion of career and technical education programs that lead to nontraditional careers

Note: Refer to the *Massachusetts Perkins IV Accountability Workbook - Secondary* for measurement definitions and other information pertaining to secondary core indicators and accountability under Perkins IV Title I.

Postsecondary Level Core Indicators

Perkins IV Title I Citation: Section 113 (b) (2) (B)

The postsecondary level core indicators quoted directly from Perkins IV Title I Section 113 (b) (2) (B) are as follows:

1P1 student attainment of challenging career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry-recognized standards, if available and appropriate

2P2 student attainment of an industry-recognized credential, a certificate, or a degree

3P1 student retention in postsecondary education or transfer to a baccalaureate degree program

4P1 student placement in military service or apprenticeship programs or placement or retention in employment, including placement in high skill, high wage, or high demand occupations or professions

5P1 student participation in career and technical education programs that lead to nontraditional careers

5P2 student completion of career and technical education programs that lead to nontraditional careers

Editor's Note: Refer to the Massachusetts Perkins IV Accountability Workbook - Postsecondary for measurement definitions and other information pertaining to postsecondary core indicators and accountability under Perkins IV Title I.

Reporting on the Core Indicators

Perkins IV Title I Citation: Section 113

Data on the secondary core indicators is contained in the Massachusetts Department of Elementary and Secondary Education Student Information Management System (SIMS) and in the Career/Vocational Technical Education Graduate Follow-up Report. The SIMS Version 2.1 Data Handbook <http://www.doe.mass.edu/infoservices/data/sims/DataHandbook.pdf> contains information on reporting in SIMS. The document titled Instructions for School Districts in Reporting Student - Level Data for Career/Vocational Technical Education <http://www.doe.mass.edu/cte/data/instructions.pdf> contains information on reporting as a supplement to the SIMS Version 2.1 Data Handbook.

Data on the postsecondary core indicators is submitted by public two-year colleges and the Perkins Postsecondary Consortium in the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report. The document titled Instructions for the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report http://www.doe.mass.edu/cte/perkins/datarpt_instruct.pdf contains information on reporting.

Adjusted Performance Levels for the Core Indicator(s)

Perkins IV Title I Citation: Section 113

Perkins IV Title I contains a provision that allows the Massachusetts Department of Elementary and Secondary Education to negotiate State performance levels with the United States Department of Education for each core indicator. The performance levels that are agreed-upon are known as State Adjusted Performance Levels.

Perkins IV Title I contains a provision that allows school districts, public two-year colleges, and consortia to negotiate performance levels with the Massachusetts Department of Elementary and Secondary Education for each core indicator. The performance levels that are agreed-upon are known as Local Adjusted Performance Levels.

Refer to the Massachusetts Perkins IV Accountability Workbook - Secondary http://www.doe.mass.edu/cte/perkins/acctworkbook_sec.doc and the Massachusetts Perkins IV Accountability Workbook - Postsecondary http://www.doe.mass.edu/cte/perkins/acctworkbook_postsec.doc for additional definitions and other information pertaining to core indicators and accountability under Perkins IV Title I.

State Perkins Improvement Plan

Perkins IV Title I Citation: Section 123

If Massachusetts fails to meet at least 90 percent of the State Adjusted Performance Level for a core indicator, the Massachusetts Department of Elementary and Secondary Education will be required to develop and implement a Massachusetts Perkins Improvement Plan for the core indicator that did not

meet the State Adjusted Performance Level. The State Perkins Improvement Plan shall be developed in consultation with the appropriate agencies, individuals, and organizations. The Massachusetts Perkins Improvement Plan shall give special consideration to performance gaps for students disaggregated by race, ethnicity, gender, disability status, migrant status, English proficiency, and economically disadvantaged status.

Subsequent Action

Perkins IV Title I Citation: Section 123

The United States Secretary of Education may, after notice and opportunity for a hearing, withhold from Massachusetts all, or a portion, of Massachusetts' allotment of Perkins IV funds if Massachusetts -

- (i) fails to implement a State Perkins Improvement Plan;
- (ii) fails to make any improvement in meeting any of the State Adjusted Performance Levels for the core indicators within the first program year of implementation of its State Perkins Improvement Plan; or
- (iii) fails to meet at least 90 percent of an agreed-upon State Adjusted Performance Level for the same core indicator for 3 consecutive years.

Local Perkins Improvement Plan

(Perkins IV Title I Citation: Section 123)

If a school district/public two-year college/consortium fails to meet at least 90 percent of the Local Adjusted Performance Level for a core indicator, the school district/public two-year college/consortium will be required to develop and implement a Local Perkins Improvement Plan for the core indicator that did not meet the Local Adjusted Performance Level. The Local Perkins Improvement Plan shall be developed in consultation with the appropriate agencies, individuals, and organizations. The Local Perkins Improvement Plan shall give special consideration to performance gaps for students disaggregated by race, ethnicity, gender, disability status, migrant status, English proficiency, and economically disadvantaged status. The Local Perkins Improvement Plan shall be submitted to the Massachusetts Department of Elementary and Secondary Education.

Subsequent Action

(Perkins IV Title I Citation: Section 123)

The Massachusetts Department of Elementary and Secondary Education may, after notice and opportunity for a hearing, withhold from the school district/public two-year college/consortium all, or a portion, of the allocation grant funds from the school district/public two-year college/consortium if the school district/public two-year college/consortium

- (i) fails to implement a Local Perkins Improvement Plan;
- (ii) fails to make any improvement in meeting any of the Local Adjusted Performance Level for the core indicators within the first program year of implementation of its Local Perkins Improvement Plan.; or (iii) fails to meet at least 90 percent of the Local Adjusted Performance Level for the same core indicator for 3 consecutive years.

PART VII - PERKINS IV TITLE I - CORRECTIONAL INSTITUTION GRANTS

Perkins IV Citation: Title I Section 112, Section 124

Perkins IV Title I Section 112 requires that an amount equal to not more than one (1) percent of the amount allotted to Massachusetts for Perkins IV Title I each year be made available to improve career and technical education that serves individuals in State institutions, such as State correctional institutions and institutions that serve individuals with disabilities per Perkins IV Title I Section 124.

In response to a **competitive** Request for Proposals (RFP) titled 'Perkins Perkins IV - Correctional Institutions' (Fund Code 452) posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under 'Competitive Requests for Proposals' a state, county correctional agency including the Massachusetts Department of Youth Services desiring Perkins IV Title I correctional institution funds may submit a proposal and a

Standard Contract Form and Application for Program Grants to the Massachusetts Department of Elementary and Secondary Education. The RFP provides specific information including but not limited to eligibility, purpose, priorities, available funding, grant duration, due date, Massachusetts Department of Elementary and Secondary Education contact person, submission, and required forms.

The purpose of this federal competitive grant is to assist correctional agencies in improving career and technical education programs that meet the general definition of career and technical education. The priority is to improve career and technical education programs by providing professional development for teachers in the programs. Funds shall not be requested to supplant state or local funds.

The Massachusetts Department of Elementary and Secondary Education convenes a review team to score proposals including the associated Standard Contract Form and Application for Program Grants and makes recommendations for approval/disapproval. The Massachusetts Department of Elementary and Secondary Education will notify successful and unsuccessful applicant agencies.

NOTE: The United States Department of Education requires that the combined expenditures proposed for both indirect and direct administrative costs in a Perkins correctional institution grant when taken together not exceed 5% of the total grant amount. The administrative cost categories (functions that should be considered as a direct administrative cost in calculating the 5% ceiling) are:

Developing the Proposal.

Supervising Perkins grant activities.

Supervising Perkins-funded staff.

Assuring compliance with applicable Federal laws.

Supporting and developing local data systems for Perkins. (This does not include data collection and analysis.)

PART VIII - PERKINS IV TITLE I – RURAL DISTRICT GRANTS

Perkins IV Citation: Title I Section 112

As outlined in Part IV of this Manual, Perkins IV Title I Section 112, the Massachusetts Department of Elementary and Secondary Education reserves a portion of the Perkins IV Title I funds that are available for distribution (allocation) for grants to school districts in:

- (1) rural areas;
- (2) areas with high percentages of career and technical education students; and
- (3) areas with high numbers of career and technical education students

In response to a competitive Request for Proposals (RFP) titled ‘Perkins Rural Districts’ (Fund Code 409) posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under ‘Competitive Requests for Proposals’ a districts/high school in a rural area may submit a proposal and a Standard Contract Form and Application for Program Grants to the Massachusetts Department of Elementary and Secondary Education. The RFP provides specific information including but not limited to eligibility, purpose, priorities, available funding, grant duration, due date, Massachusetts Department of Elementary and Secondary Education contact person, submission, and required forms.

The purpose of this competitive grant is to improve career and technical education programs in rural districts. The grant will assist rural districts that will not be recipients of Carl D. Perkins Career & Technical Education Improvement Act (Perkins IV) allocation funds due to minimum dollar amount requirements and/or lack of personnel and resources needed to form or join a consortium in order to prepare a Local Plan.

The Massachusetts Department of Elementary and Secondary Education convenes a review team to score proposals including the associated Standard Contract Form and Application for Program Grants and

makes recommendations for approval/disapproval of applicants for a Perkins Rural Districts (Fund Code 409) grant. The Massachusetts Department of Elementary and Secondary Education will notify successful and unsuccessful applicant districts.

NOTE: The United States Department of Education requires that the combined expenditures proposed for both indirect and direct administrative costs in a Perkins rural grant when taken together not exceed 5% of the total grant amount. The administrative cost categories (functions that should be considered as a direct administrative cost in calculating the 5% ceiling) are:

Developing the Proposal.

Supervising Perkins grant activities.

Supervising Perkins-funded staff.

Assuring compliance with applicable Federal laws.

Supporting and developing local data systems for Perkins. (This does not include data collection and analysis.)

PART IX - PERKINS IV TITLE I – GENDER EQUITY INITIATIVE

Perkins IV Citation: Title I Section 112, Section 124

Perkins IV requires that the Massachusetts Department of Elementary and Secondary Education use not less than \$60,000 and not more than \$150,000 for services that increase the enrollment and retention in career and technical education programs that prepare students for careers that would be nontraditional for their gender. The term nontraditional by gender career means a career for which individuals from one gender comprise less than 25 percent of the individuals employed in the career. Under Perkins IV, Massachusetts uses the lists of nontraditional careers produced by the National Alliance for Partnerships Equity (NAPE) and the Massachusetts Supplement to the NAPE Nontraditional by Gender Lists. The lists and supplement are available on the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website <http://www.doe.mass.edu/cte/ntbg/>.

Additional Resources: Visit <http://www.doe.mass.edu/cte/ntbg/>

PART X - PERKINS IV TITLE I - CAREER/VOCATIONAL TECHNICAL STUDENT ORGANIZATIONS

Perkins IV Citation: Title I Section 124

Perkins IV permits the Massachusetts Department of Elementary and Secondary Education to use Perkins IV Title I leaderships funds to assist in supporting career/vocational technical student organizations (CVTSOs), especially with respect to increasing the participation and success of students who are members of special populations. Special populations are:

- individuals with disabilities
- individuals from economically disadvantaged families, including foster children
- individuals preparing for nontraditional careers
- single parents, including single pregnant women
- displaced homemakers
- individuals with limited English proficiency

The organizations assisted in Massachusetts are Business Professionals of America (BPA), Distributive Education Clubs of America (DECA), FFA - An Organization for Students Studying Agriculture (FFA), Health Occupations Students of America (HOSA), and Skills USA.

Either as a result of competitive Request for Proposals (RFP) titled 'Perkins Career/Vocational Technical Education Student Organization' (Fund Code 414) posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under 'Competitive Requests for Proposals' or an Interagency Service Agreement (ISA) with another

State agency, the Massachusetts Department of Elementary and Secondary Education provides Perkins IV Title I State leadership funds to one district or agency per CVTSO for the coordination of statewide activities. Pursuant to the Code of Federal Regulations (CFR) Title 34, Chapter IV, Part 400, Section 403.71 (c) (1) http://www.doe.mass.edu/cte/fedreg_code.html, Perkins IV funds shall not be requested or used for:

- lodging, feeding, conveying, or furnishing transportation to conventions;
- purchase of supplies, jackets, and other effects for students' personal ownership;
- cost of non-instructional activities such as athletic, social, or recreational events;
- printing and disseminating non-instructional newsletters;
- purchase of awards for recognition of students, advisors, and other individuals;
- payment of student membership dues;
- anything that would supplant non-Federal funds; and
- mini grants.

Career/vocational student organizations also provide technical assistance and professional development for educators.

NOTE: The United States Department of Education requires that the combined expenditures proposed for both indirect and direct administrative costs in a Perkins CVTSO grant when taken together not exceed 5% of the total grant amount. The administrative cost categories (functions that should be considered as a direct administrative cost in calculating the 5% ceiling) are

Developing the Proposal.

Supervising Perkins grant activities.

Supervising Perkins-funded staff.

Assuring compliance with applicable Federal laws.

Supporting and developing local data systems for Perkins. (This does not include data collection and analysis.)

PART XI - PERKINS IV TITLE I - PROGRAMS of STUDY

Perkins IV Citation: Title I Section 122, Section 135

Perkins IV Title I Section 135 requires that each school district, public two-year college, and consortium with a Local Plan and associated grant under Perkins IV Title I have at least one Program of Study that meets this definition:

A Program of Study under Perkins IV shall: (1) incorporate secondary and postsecondary elements; (2) include coherent and rigorous content aligned with challenging academic standards; (3) include relevant career and technical content in (4) include a coordinated, non-duplicative progression of courses that aligns secondary education with postsecondary education to adequately prepare students to succeed in postsecondary education.

The Program of Study may also include the opportunity for secondary education students to participate in dual or concurrent enrollment programs or other ways to acquire postsecondary education credits.

Each school district's and secondary-level consortium's Five-Year Local Plan under Perkins IV Title I described how the district (if a consortium, each district within the consortium) will, in partnership with at least one postsecondary institution, develop Program of Study Grids for career and technical education program within the district.

PART XII - PERKINS IV TITLE I – TECHNICAL ASSISTANCE

Perkins IV Citations: Title I Section 112, Section 124

As indicated in Part I of this manual and the Massachusetts State Plan for Career and Technical Education, the Massachusetts Department of Elementary and Secondary Education is committed to providing quality technical assistance for each school district, public two-year college, consortium, and correctional agency with career and technical education programs. Each school district, public two-year college, consortium, and correctional agency with career and technical education programs that are improved with Perkins IV Title I funds has a liaison in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education. School district, public two-year college, consortium, and correctional agency staff should contact their liaison for information and assistance. The list of liaisons and contact information is located on the Massachusetts Department of Elementary and Secondary Education – Career/Vocational Technical Education website at <http://www.doe.mass.edu/cte/liaison.html>)

As noted in Part IX of this manual, the Gender Equity Initiative and various career/vocational student organizations supported with Perkins funds provide both technical assistance and professional development

Additional Technical Assistance

- **The Massachusetts Department of Labor** - Division of Occupational Safety provides technical assistance and professional development for schools with career and technical education programs concerning the occupational safety and health strand of “all aspects of the industry” and the Massachusetts Vocational Technical Education Frameworks.
- **The Massachusetts Department of Public Health** also provides technical assistance and professional development for schools with career and technical education programs concerning the occupational safety and health strand of “all aspects of the industry” and the Massachusetts Vocational Technical Education Frameworks.
- **The Federal OSHA Alliance** provides professional development for teachers in career and technical education programs concerning the occupational safety and health strand of “all aspects of the industry” and the Massachusetts Vocational Technical Education Frameworks.

PART XIII - PERKINS IV TITLE I - PROFESSIONAL DEVELOPMENT

Perkins IV Citations: Title I Section 134, Section 135,

The Massachusetts Department of Elementary and Secondary Education is committed to providing professional development that meets the requirements for professional development set forth in Perkins IV. In addition, the Department collaborates with other agencies and organizations on professional development for educators in career and technical education.

Professional Development Set-aside in Perkins IV Local Plans (One-Year Transition and Five Year) -

Section of Perkins IV Title I requires that Perkins allocation funds be used for professional development activities for technical teachers, academic teachers, administrators, career and guidance counselors who are involved in career and technical education programs. Perkins IV requires that the professional development include (A) in-service and pre-service training on (i) effective academic and technical integration provided jointly with academic and technical teachers to the extent practicable; (ii) effective teaching skills based on research that includes promising practices; (iii) effective practices to improve parental and community involvement; and (iv) effective use of scientifically based research and data to improve instruction.

In Massachusetts, each school district/public two-year college/consortium that submits a Perkins IV Five-Year Local Plan must use a portion of the allocation grant for professional development consistent with the requirements contained in Section 135 of Perkins IV Title I as follows:

- allocation funds shall be used for professional development activities to the extent appropriate and feasible for technical teachers, academic teachers, administrators, school counselors who are involved in career and technical education programs;
- professional development will cover to the extent appropriate and feasible (i) effective integration and use of challenging academic and technical knowledge and skills provided jointly with academic and technical teachers to the extent practicable; (ii) effective teaching skills based on research that includes promising practices; (iii) effective practices to improve parental and community involvement; and (iv) effective use of scientifically based research and data to improve instruction; (v) all aspects of the industry; (v) internship programs that provide relevant business/industry experience; and (vi) training teachers in the effective use and application of technology to improve instruction.

The professional development provided with allocation funds must be high quality, sustainable, intensive, and focused in order to have a positive and lasting impact on instruction and learning. One-day or short-term workshops or conferences without follow-up activities and/or deliverables are not fundable with Perkins IV allocation funds.

Grants for Professional Development -

Perkins IV Citations: Title I Section 112, Section 124

Perkins IV Section 124 requires that Massachusetts provide professional development programs with Perkins State leadership funds.

Perkins Leadership Academies: Perkins Leadership Academies: In response to a continuation Request for Proposals (RFP) titled ‘Perkins Leadership Academy One ’ (Fund Code 410-A) and ‘Perkins Leadership Academy Two (Fund Code 410-C) will be posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under ‘Continuation Requests for Proposals’ for FY 2012 a partnership of districts may submit a proposal and a Standard Contract Form and Application for Program Grants in response to one or both RFPs to the Massachusetts Department of Elementary and Secondary Education. The RFP provides specific information including but not limited to eligibility, purpose, priorities, available funding, grant duration, due date, Massachusetts Department of Elementary and Secondary Education contact person, submission, and required forms.

The purpose of this continuation grants is to provide high-quality, intensive, and focused professional development for aspiring leaders in career and technical education in order to:

- enhance career and technical education for students including those in special populations;
- create a network of educators in career and technical education in order to share resources and provide mentoring and support within the network throughout their careers;
- prepare them for initial vocational technical administrator licensure and leadership positions in career and technical education.

Secondary Postsecondary Linkages:

In partnership with the Massachusetts Community College Executive Office, the Massachusetts Department of Elementary and Secondary Education will provide professional development for educators from high schools and public two-year colleges with local plans under the Carl D. Perkins Career and Technical Education Improvement Act to support of secondary-postsecondary linkages in career and technical education programs of study.

Seminars will be designed to assist administrators, instructors, and school guidance counselors in the development, implementation and evaluation of strategies, activities and interventions that improve

preparation, advisement and support for postsecondary readiness and success. Seminar topics will include:

- (1) Strategies for planning and implementing Early Assessment Programs (EAPs) to provide: (1) educators with tools for using assessment data/results to inform curriculum and instruction and school counseling program delivery and (2) students and parents/guardians with information and advisement about college placement assessments and their implications for successfully transition into college level credit bearing courses..
- (2) curriculum mapping and alignment to reduce remediation rates and increase persistence rates of first-year students enrolled in postsecondary career and technical education programs;
- (3) career guidance/advising resources and tools designed to increase the number of students who matriculate into postsecondary education with dual and/or articulated credits relevant to their programs of studies.

For additional information, contact Karen DeCoster in the Office for Career/Vocational Technical Education at 781-338-3115 or kdecoster@doe.mass.edu.

Vocational Technical Education Framework Professional Development: The Massachusetts Department of Elementary and Secondary Education understands the necessity of keeping the Vocational Technical Education Frameworks current. The Department will assemble teams of highly qualified educators and business and industry partners to review selected frameworks. These teams will be comprised of at least five technical teachers using the frameworks, three college professors teaching in the VTEF program area, one educator with experience in the development of a VTEF; one academic curriculum coordinator associated with secondary-level Chapter 74-approved VTE programs; three academic teachers (one in mathematics, one in English language arts, and one in science); one vocational technical coordinator; one representative from a registered apprenticeship program, if applicable; one expert from the applicable industry; a lead person from an appropriate industry association, if applicable; one labor market expert, and others, as appropriate.

Additional Professional Development –

The Massachusetts Department of Elementary and Secondary Education may issue additional competitive RFPs using Perkins IV Title I State leadership funds. The RFPs would be posted on the Massachusetts Department of Elementary and Secondary Education - Grants Information website <http://finance1.doe.mass.edu/Grants/> under ‘Competitive Requests for Proposals.’

The Massachusetts Department of Elementary and Secondary Education may issue competitive Requests for Responses (RFRs) using Perkins IV Title I State leadership funds. The RFRs would be posted on the Commonwealth Procurement Access & Solicitation System (*Comm-Pass*) website <http://www.comm-pass.com/>.

PART XIV - PERKINS IV TITLE I REPORTING

Perkins IV Citation: Title I Section 113,

SIMS

School districts are required to submit student-level data on students enrolled in career/vocational technical education programs (9-12 grade level) in the Massachusetts Department of Elementary and Secondary Education Student Information Management System (SIMS.) The SIMS Data Handbook is a required resource. It is available at <http://www.doe.mass.edu/infoservices/data/sims/>. The document titled Instructions for School Districts in Reporting Student - Level Data for Career/Vocational Technical

Education <http://www.doe.mass.edu/cte/data/instructions.pdf> is a supplement to the SIMS Data Handbook.

Chapter 74 Vocational Technical Education Postsecondary and Postgraduate Report

School districts are required to submit data on students enrolled in career/vocational technical education programs (postgraduate and postsecondary level) using the

Chapter 74 Vocational Technical Education Postsecondary and Postgraduate Report

<http://www.doe.mass.edu/cte/data/post2010.xls>. The document titled Instructions for School Districts in Reporting Student - Level Data for Career/Vocational Technical Education

<http://www.doe.mass.edu/cte/data/instructions.pdf> contains applicable information.

Career/Vocational Technical Education Graduate Follow-up Report (Database)

School districts are required to submit data on graduates of career/vocational technical education programs through the Massachusetts Department of Elementary and Secondary Education Security Portal.

Instructions in the Instructions for School Districts in Reporting Student - Level Data for

Career/Vocational Technical Education <http://www.doe.mass.edu/cte/data/instructions.pdf>.

Massachusetts Perkins IV Public Two-Year College/Consortium Career and Technical Education Data Report

Public two-year colleges and the Perkins Postsecondary Consortium are required to submit this Report. It is available with instructions at <http://www.doe.mass.edu/cte/data/>. The instructions are contained in the document titled Instructions for the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report at <http://www.doe.mass.edu/cte/data/>.

Massachusetts Perkins IV Career and Technical Education Pell Grant Report

Public two-year colleges and school districts with postsecondary career and technical education programs are required to submit this Report by December 31 each year if they wish to be computed for a Perkins IV Title I allocation.

Massachusetts Perkins IV Accountability Workbook - Secondary

http://www.doe.mass.edu/cte/perkins/acctworkbook_sec.doc

Massachusetts Perkins IV Accountability Workbook - Postsecondary

http://www.doe.mass.edu/cte/perkins/acctworkbook_postsec.doc

This Workbook will be used to track and negotiate performance levels.

Financial Reports

School districts/public two-year colleges/consortia that receive Perkins IV funds are required to submit Final Financial Report(s) to the Massachusetts Department of Elementary and Secondary Education-Grants Management unit. Final Financial Reports are due thirty days after the grant end date. If the grant included Massachusetts Teachers Retirement (MTR), FR – 1 (A) form reconciling the MTR must also be returned to the Grants Management unit. These forms are available on the Massachusetts Department of Elementary and Secondary Education - Grants Information website at

<http://finance1.doe.mass.edu/Grants/procedure/forms/h.doc>.

Consequences of Failing to Submit Required Reports

Failure to submit required reports by the due date(s) may result in the school district/public two-year college/consortium not receiving Perkins IV allocation funds. Failure to submit required corrections to the Reports by the due date set by ESE may result in the school district/public two-year college/consortium not receiving Perkins IV allocation funds.

PART XV - PERKINS IV TITLE I MONITORING

Perkins IV Citation: Title I Section 113, Section 121,

The Massachusetts Department of Elementary and Secondary Education conducts onsite monitoring of Perkins IV assisted school districts/public two-year colleges/consortia to determine compliance with

Perkins IV requirements. Technical assistance is simultaneously provided during onsite monitoring. For school districts, onsite monitoring is scheduled as part of the Massachusetts Department of Elementary and Secondary Education Coordinated Program Review system where several federal and state programs including Perkins IV are monitored in the school district at the same time. The Perkins monitoring criteria and additional information may be obtained at the Massachusetts Department of Elementary and Secondary Education Compliance/Monitoring website at <http://www.doe.mass.edu/pqa/review/cpr/>.

The Massachusetts Department of Elementary and Secondary Education conducts onsite monitoring of Perkins IV assisted public two-year colleges using the criteria contained in the document titled: Massachusetts Department of Elementary and Secondary Education Selected Career & Technical Education Public Two-Year College Program Review Criteria Addressing Perkins Vocational and Technical Education Act Requirements. This document may be accessed at the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website at <http://www.doe.mass.edu/cte/monitoring/>.

The Massachusetts Department of Elementary and Secondary Education monitors school districts/public two-year colleges/consortia for civil rights compliance based on the Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color National Origin, Sex and Handicap in Vocational Education Programs - 34 CFR, Part 100, Appendix B. The monitoring instruments and related information may be accessed at the Massachusetts Department of Elementary and Secondary Education - Career/Vocational Technical Education website at <http://www.doe.mass.edu/cte/monitoring/>.

The Massachusetts Department of Elementary and Secondary Education may contract with an independent certified public accounting firm or use staff from the Department to conduct financial and data reviews. Staff will spend one to three days at each school district/public two-year college/consortium. For school districts, the reviews will be conducted in conjunction with Coordinated Program Reviews. For other grant recipients, reviews will be conducted in conjunction with, or apart from other reviews.

PART XVIII - PERKINS IV TITLE I - ADDITIONAL COMPLIANCE INFORMATION

Perkins IV Citations: Title I, , Title III
Education Department General Administrative Regulations (EDGAR)
OMB Circular A - 87

Amendments

Amendment to the Standard Contract Form and Application for Program Grants

Grant recipients must obtain pre-approval from the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education when an increase in a line item of the budget exceeds \$100 or 10 percent of the line item (whichever is greater), or exceeds \$10,000. Grant recipients must submit an Amendment Request Form (Form AM1) for the pre-approval. The Amendment Request Form (Form AM1) must be submitted at least 30 days prior to the proposed change and no later than 30 days prior to the termination date of the grant. The Amendment Request Form (Form AM1) is available on the Massachusetts Department of Elementary and Secondary Education - Grants Information website at <http://finance1.doe.mass.edu/Grants/>.

Minor Budget Changes and Local Plan/Update Programmatic Changes

Grant recipients must obtain pre-approval from the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education for all minor budget changes (minor budget changes are those not requiring an Amendment Request Form AM1). Grant recipients shall contact their liaison in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education regarding minor budget changes. The liaison will advise the grant recipient to file an email with her/him outlining the proposed change. The liaison will respond to the email by email with a determination of approval or disapproval. The liaison will file the

email(s) in the grant recipient's electronic file in the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education. The grant recipient should retain a copy of the email(s).

Grant recipients must obtain pre-approval from the Massachusetts Department of Elementary and Secondary Education - Office for Career/Vocational Technical Education for all non-financial changes, i.e. programmatic changes such as staffing, from that which was contained in the accepted Local Plan/Update or the approved proposal/competitive grant including the secondary postsecondary linkage plan/grant. Grant recipients shall contact their liaison in the Massachusetts Department of Elementary and Secondary Education – Office for Career/Vocational Technical Education regarding such programmatic changes. The liaison will advise the grant recipient to file an email with her/him outlining the proposed change. The liaison will respond to the email by email with a determination of acceptance or non-acceptance. The liaison will file the email(s) in the grant recipient's electronic file in the Massachusetts Department of Elementary and Secondary Education – Office for Career/Vocational Technical Education. The grant recipient should retain a copy of the email(s).

Education Department General Administrative Regulations (EDGAR)

Perkins IV grant recipients are advised to review and comply with these regulations, as applicable for Perkins IV grants. United States Department of Education, Grants Policy and Oversight Staff, Education Department General Administrative Regulations (EDGAR), Washington, D.C., 20005.

www.ed.gov/policy/fund/reg/edgarReg/edgar.html.

Equipment

Equipment is defined as tangible, non-expendable, personal property having a useful life of more than one year and an acquisition cost of \$5,000 per unit. An item with an acquisition cost of less than \$5,000 per unit is considered a supply.

Equipment purchased with federal funds, including Perkins IV funds must have:

- property records including acquisition date, cost, source, percent of federal funds used to purchase the item, location, use and condition of the equipment and ultimate disposition
- adequate safeguards to prevent loss, damage, or theft
- adequate maintenance procedures

Equipment purchased with Perkins IV funds may be used as described in the Perkins IV Local Plan/Update, but may also be used in other programs under certain conditions. The equipment may be used as long as the use is incidental and does not interfere with the original purpose of the acquisition and does not add to the cost of using the equipment. Examples of multiple uses of equipment purchased with federal funds include:

- Using Perkins IV funded computer equipment at a summer computer camp or an after school program.
- Using a Perkins IV funded CNC lathe in an adult training program.

Equipment with a current market value of less than \$5,000 may be retained or sold without further obligation to the federal government as long as adequate records of the equipment's market value, maintenance history, and ultimate disposition are kept by the service provider. For more information about the use and disposition of equipment, contact a liaison in the Massachusetts Department of Elementary and Secondary Education-Career/Vocational Technical Education unit, or refer to OMB Circular A-87 at <http://www.whitehouse.gov/omb/circulars/a087/a087-all.html>.

Nontraditional by Gender Lists

The Massachusetts Department of Elementary and Secondary Education adopted the lists from the National Alliance for Partnerships in Equity (NAPE) for use under Perkins IV. The three lists are:

NAPE List of Nontraditional by Gender Careers for Females
<http://www.napequity.org/Spreadsheets/SOC-CIP-Cluster-Pathway%20Crosswalk%20Nontrad%20for%20Females%208.10.07.xls>

NAPE List of Nontraditional by Gender Careers for Males <http://www.napequity.org/Spreadsheets/SOC-CIP-Cluster-Pathway%20Crosswalk%20Nontrad%20for%20Males%208.8.07.xls>

Massachusetts Supplement to the NAPE Nontraditional by Gender Lists
<http://www.doe.mass.edu/cte/ntbg/NAPElists.pdf>

OMB Circular A – 87

Perkins IV grant recipients are advised to review and comply with the rules in this circular, as applicable for Perkins grants. It is available at <http://www.whitehouse.gov/OMB/circulars/a087/a087-all.html>

Single Audit Act

Most recipients of Perkins IV funds are subject to the Single Audit Act that requires that recipients of \$100,000 or more of federal funds in a year must be audited for that year in accord with OMB Circular A-128. The audit must be conducted by an independent auditor and must include review of financial statements, internal controls, and compliance with laws and regulations.

Statement of Assurances

Each recipient of Perkins IV funds must have filed a Uniform Statement of Assurances with the Massachusetts Department of Elementary and Secondary Education. The Massachusetts Department of Elementary and Secondary Education-Grants Management unit provides the forms with instructions to school districts/public two-year colleges.

Stevens Amendment

The Stevens Amendment to the Department of Defense Appropriations Act of 1989 requires that any documents relating to projects funded fully or partially with Perkins funds (or other federal funds) must clearly state the dollar amount of federal funds for the project and the percent of the total cost of the project that will be financed with federal funds. This requirement applies to bids, press releases, statements, or other documents describing the project.

APPENDIX A

Massachusetts Perkins IV Career and Technical Education Program Checklist

Program of Study: _____

Person(s) completing this checklist (including job titles): _____

Date checklist was completed: _____

Perkins IV Citation: Section 3

The term career and technical education means organized educational activities that-

(A) offer a sequence of courses that—

(i) provides individuals with coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills needed to prepare for further education and careers in current or emerging professions;

(ii) provides technical skill proficiency, an industry-recognized credential, a certificate, or an associate degree; and

(iii) may include prerequisite courses (other than a remedial course) that meet the requirements of this subparagraph; and

(B) include competency-based applied learning that contributes to the academic knowledge, higher-order reasoning and problem-solving skills, work attitudes, general employability skills, technical skills, and occupation-specific skills, and knowledge of all aspects of an industry including entrepreneurship, of an individual.

Standard	Measure	Examples - Evidence/Source Document	✓
1. The program has organized educational activities.	A program description that includes required academic and technical courses is published.	School/College Catalog Program of Study Website	
2. The program includes a sequence of courses. *	The sequence of courses includes at least two technical courses in the same occupational field and academic courses. A technical course is a course that provides individuals with technical occupational knowledge and skills.*	School/College Catalog Program of Study Program of Study Grid Website	
3. The program provides students with coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills.	Academic and technical instruction is integrated and for high schools is based on the applicable Massachusetts Curriculum Frameworks and the applicable Massachusetts Vocational Technical Education Framework.	Program of Study Program of Study Grid Course Syllabi Lesson Plans Competency List	
4. includes both secondary and postsecondary elements that prepare students for further education.	Current articulation agreements with two and/or four year colleges, and registered apprenticeship programs (if applicable) exist, are under development or are proposed and the school/college has verified (with an advisory committee that includes representatives from postsecondary education that includes registered apprenticeship programs (if applicable)) that the program prepares students for further education, and registered apprenticeships (if applicable).	Articulation Agreement(s) (existing, under development, proposed) Program of Study Program of Study Grid Minutes of Advisory Committee Meetings	
5. The program prepares students for careers in current or emerging professions.	The school/college has verified the labor market for the program with an advisory committee that includes representatives from business/industry and postsecondary education including registered apprenticeship programs (if applicable), and/or the local Workforce Investment Board (WIB).	Minutes of Advisory Committee Meetings WIB Documentation Program of Study Program of Study Grid	
6. The program provides	An organization that is nationally recognized by the	Accreditation Document	

students with technical skill proficiency, an industry-recognized credential, a certificate, or an associate degree.	specific industry or industry cluster for which the students are being prepared, and that is involved in the accreditation, approval and/or certification of career and technical education programs has accredited, approved or certified the program, if applicable, and/or the state agency that issues licenses for individuals in the specific industry has approved or certified the program, as applicable.	Approval Document Certification Document Credentials conferred Certificates conferred Degrees conferred	
7. The program includes competency-based applied learning.	The knowledge and skills to be acquired by students are published.	Program of Study Program of Study Grid Lesson Plans Course Syllabi Competency List Website	
8. The program contributes to students' higher-order reasoning and problem-solving skills.	The curriculum for the program includes higher-order reasoning and problem-solving skills.	Program of Study Program of Study Grid Lesson Plans Course Syllabi Competency List	
9. The program provides students with general employability knowledge and skills.	The program includes the use of work-based learning as appropriate and feasible, as well as career development curricula.	Career Plans Work-based Learning Plans Program of Study Program of Study Grid Course Syllabi Lesson Plans Competency List	
10. The program provides students with occupational safety and health knowledge and skills.	The curriculum for the program includes occupational safety and health knowledge and skills.	Program of Study Program of Study Grid Lesson Plans Course Syllabi Competency List	
11. The program provides students with management and entrepreneurship knowledge and skills.	The curriculum for the program includes management and entrepreneurship knowledge and skills.	Program of Study Program of Study Grid Lesson Plans Course Syllabi Competency List	
12. The program provides students with computer knowledge and skills.	The curriculum for the program includes computer knowledge and skills.	Program of Study Program of Study Grid Lesson Plans Course Syllabi Competency List	

* for public two year college degree programs, the sequence of courses means at least 15 credits of technical courses in addition to the academic courses required by the degree program. For public two-year college or school district postsecondary certificate or other programs, the sequence of courses means at least two technical courses and at least one academic course or academic component within a technical course.

APPENDIX B - ADDITIONAL SELECTED REFERENCES

Note: Many of the references below are also contained in the body of this Manual.

Carl D. Perkins Career and Technical Education Improvement Act of 2006 P.L. 109-270 (Perkins IV)
http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=109_cong_bills&docid=f:s250enr.txt.pdf

Career/Vocational Technical Education Advisory Committee Guide
<http://www.doe.mass.edu/cte/resources/acguide.pdf>

Career/Vocational Technical Education Safety and Health Guide
<http://www.doe.mass.edu/cte/safety/guide.pdf>

Chapter 74 Vocational Technical Education Program Directory
<http://www.doe.mass.edu/cte/programs/directory.pdf>

Coordinated Program Review Procedures - School District Information Package Career/Vocational Technical Education (CVTE) <http://www.doe.mass.edu/pqa/review/cpr/instrument/cvte.pdf>

Education Department General Administrative Regulations (EDGAR)
<http://www.ed.gov/policy/fund/reg/edgarReg/edgar.html>

Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99)
<http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.html>

Grants for Schools: Getting Them and Using Them, A Procedural Manual
<http://finance1.doe.mass.edu/Grants/procedure/manual.html>

Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color National Origin, Sex and Handicap in Vocational Education Programs - 34 CFR, Part 100, Appendix B
<http://www2.ed.gov/about/offices/list/ocr/docs/vocre.html>

Instructions for the Massachusetts Perkins IV Public Two-Year College/Postsecondary Consortium Career and Technical Education Data Report http://www.doe.mass.edu/cte/perkins/datarpt_instruct.pdf

Instructions for School Districts in Reporting Student - Level Data for Career/Vocational Technical Education <http://www.doe.mass.edu/cte/data/instructions.pdf>

Massachusetts Career Development Website <http://www.doe.mass.edu/cd/>

Massachusetts Department of Workforce Development - Division of Apprenticeship Training
<http://www.mass.gov/dat/>

Massachusetts Student Record Regulations 603 CMR 23.00
<http://www.doe.mass.edu/lawsregs/603cmr23.html>

Massachusetts Perkins Accountability Workbook - Secondary
http://www.doe.mass.edu/cte/perkins/acctworkbook_sec.pdf

Massachusetts Perkins IV Accountability Workbook – Postsecondary
http://www.doe.mass.edu/cte/perkins/acctworkbook_postsec.pdf

Massachusetts Perkins IV Manual http://www.doe.mass.edu/cte/perkins/perkins_manual.pdf

Massachusetts Supplement to the Nontraditional by Gender List
<http://www.doe.mass.edu/cte/ntbg/NAPElists.pdf>

Massachusetts Vocational Technical Education Frameworks <http://www.doe.mass.edu/cte/frameworks/>

NAPE List of Nontraditional by Gender Careers for Females
<http://www.napequity.org/Spreadsheets/SOC-CIP-Cluster-Pathway%20Crosswalk%20Nontrad%20for%20Females%208.10.07.xls>

NAPE List of Nontraditional by Gender Careers for Males <http://www.napequity.org/Spreadsheets/SOC-CIP-Cluster-Pathway%20Crosswalk%20Nontrad%20for%20Males%208.8.07.xls>

No Child Left Behind Act of 2001 <http://www.ed.gov/policy/elsec/leg/esea02/index.html>

OMB CIRCULAR A – 87 <http://www.whitehouse.gov/OMB/circulars/a087/a087-all.html>

SIMS Version 2.1 Data Handbook <http://www.doe.mass.edu/infoservices/data/sims/DataHandbook.pdf>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Career/Vocational Technical Education) at <http://www.doe.mass.edu/cte/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (English Language Learners) <http://www.doe.mass.edu/ell>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (General Educational Development - GED) <http://www.doe.mass.edu/ged/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Education Laws and Regulations) <http://www.doe.mass.edu/lawsregs/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Massachusetts Comprehensive Assessment System - MCAS) <http://www.doe.mass.edu/mcas/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (MassOne Online Network for Education) <http://massone.mass.edu/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (No Child Left Behind) <http://www.doe.mass.edu/nclb/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Program Quality Assurance) <http://www.doe.mass.edu/pqa/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (School and District Accountability) <http://www.doe.mass.edu/sda/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Special Education) <http://www.doe.mass.edu/sped/>

Web Pages of the Massachusetts Department of Elementary and Secondary Education (Title One) <http://www.doe.mass.edu/titlei/>

APPENDIX C – TIMELINES for SCHOOL DISTRICTS & SECONDARY CONSORTIA (does not include timelines for monitoring)

- October SIMS Data Reporting each year.
- March SIMS Data Reporting each year.
- End-of-Year (June) SIMS Data Reporting each year.

References:

Instructions for School Districts in Reporting Student-Level Data for Career/Vocational Technical Education at <http://www.doe.mass.edu/cte/data/instructions.doc>
SIMS Data Handbook at <http://www.doe.mass.edu/infoservices/data/sims/DataHandbook.doc>

Due: Standard Contract Form and Application for Program Grants - rolling submission – In order to be reasonably assured that funds will be available by the beginning of the school year, the Standard Contract Form and Application for Program Grants should be submitted by **Friday, July 8, 2011**.

Reference:

Request for Proposals titled “Perkins Secondary Allocation Grant 2011-2012”
<http://finance1.doe.mass.edu/Grants/grants11/rfp/400.html>

Due: Proposals and Standard Contract Form and Application for Program Grants in response to any additional **applicable** Request for Proposals (RFP) issued that may be issued by the Office for Career/Vocational Technical Education - submit by due date and time set forth in the RFP.

Reference:

Applicable Request for Proposals posted at <http://finance1.doe.mass.edu/Grants/>

Career/Vocational Technical Education Graduate Follow-up Data - submit by **November 30, 2011**.

Reference:

Instructions for School Districts in Reporting Student-Level Data for Career/Vocational Technical Education at <http://www.doe.mass.edu/cte/data/instructions.doc>

Local Adjusted Performance Level Negotiation Charts for Perkins Performance Years 5 (2011-2012) & 6 (2012-2013) - see the Reference cited below for due date.

Planned due date: **October 14, 2011**

Reference:

Massachusetts Perkins IV Accountability Workbook - Secondary - at <http://www.doe.mass.edu/cte/perkins/>

Local Perkins Improvement Plans, if required - see the Reference cited below for due date.

Planned due date: **February 24, 2012**.

Reference:

Massachusetts Perkins IV Accountability Workbook - Secondary at <http://www.doe.mass.edu/cte/perkins/>

Annual Perkins Report 2011 - see the Reference cited below for due date.

Planned due date: **March 30, 2012**.

Reference:

Massachusetts Perkins IV Accountability Workbook - Secondary at <http://www.doe.mass.edu/cte/perkins/>

APPENDIX D – TIMELINES for PUBLIC TWO-YEAR COLLEGES & POSTSECONDARY CONSORTIUM (does not include timelines for monitoring)

<p>Due: Massachusetts Perkins IV College/Postsecondary Consortium Career and Technical Education Data Report 2011 - submit by May 31, 2012.</p> <p>References: Instructions for the Massachusetts Perkins IV Public Two - Year College/Postsecondary Consortium Career and Technical Education Data Report 2011 at http://www.doe.mass.edu/cte/data/</p> <p>Template for the Massachusetts Perkins IV Public Two - Year College/Postsecondary Consortium Career and Technical Education Data Report 2011 at http://www.doe.mass.edu/cte/data/</p>
<p>Due: Standard Contract Form and Application for Program Grants - rolling submission - In order to be reasonably assured that funds will be available by the beginning of the college/school year, the Standard Contract Form and Application for Program Grants should be submitted by September 9, 2011</p> <p>Reference: Request for Proposals titled “Perkins Postsecondary Allocation Grant 2012-2014” http://finance1.doe.mass.edu/Grants/grants11/rfp/401.html</p>
<p>Due: Proposals and Standard Contract Form and Application for Program Grants in response to any additional applicable Request for Proposals (RFP) issued that may be issued by the Office for Career/Vocational Technical Education - submit by due date and time set forth in the RFP.</p> <p>Reference: Applicable Request for Proposals posted at http://finance1.doe.mass.edu/Grants/</p>
<p>Due: Massachusetts Perkins IV Pell Grant Report Fall Semester 2011 - see the Reference cited below for due date.</p> <p>Reference: Massachusetts Perkins IV Pell Grant Report Fall Semester 2010 at http://www.doe.mass.edu/cte/data/</p>
<p>Due: Local Adjusted Performance Level Negotiation Charts for Perkins Performance Years 5 (2011-2012) & 6 (2012-2013) - see the Reference cited below for due date. Planned due date: October 14, 2011</p> <p>Reference: Massachusetts Perkins IV Accountability Workbook - Postsecondary - 2012-2014 at http://www.doe.mass.edu/cte/perkins/</p>
<p>Due: Local Perkins Improvement Plans, if required - see the Reference cited below for due date. Planned due date: February 24, 2011</p> <p>Reference: Massachusetts Perkins IV Accountability Workbook - Postsecondary at http://www.doe.mass.edu/cte/perkins/</p>
<p>Due: Annual Perkins Report 2011 - see the Reference cited below for due date. Planned due date: March 30, 2011</p> <p>Reference: Massachusetts Perkins IV Accountability Workbook - Postsecondary at http://www.doe.mass.edu/cte/perkins/</p>

APPENDIX E – TIMELINES for CORRECTIONAL AGENCIES (does not include timelines for monitoring)

Due: Standard Contract Form and Application for Program Grants - submit by due date and time set forth in the **competitive** Request for Proposals cited below under Reference.

Planned due date: **September 2, 2011**

Reference:

Request for Proposals titled “Perkins Correctional Institutions 2011-2012

<http://finance1.doe.mass.edu/Grants/grants11/rfp/452.html>

Due: Annual Perkins Report - submit by **March 30, 2012**

Report forms with instructions will be emailed to correctional agencies in **December, 2011.**

APPENDIX F – TIMELINES for RURAL DISTRICT GRANT RECIPIENTS

Due: Standard Contract Form and Application for Program Grants - submit by due date and time set forth in the **competitive** Request for Proposals cited below under Reference.

Planned due date: **To be announced.**

Reference:

Request for Proposals titled “Perkins Rural Districts 2011-2012”

<http://finance1.doe.mass.edu/Grants/grants11/rfp/409.html>

Career/Vocational Technical Education Graduate Follow-up Data - submit by **November 30, 2011.**

References:

Instructions for School Districts in Reporting Student-Level Data for Career/Vocational Technical Education at <http://www.doe.mass.edu/cte/data/instructions.doc>

Request for Proposals (RFP) for the grant. Archived RFPs are posted at

<http://finance1.doe.mass.edu/Grants/>.