

Perkins V Monitoring

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Continual Monitoring

Financial

1. Budget Reports

- Detailed budget reports showing the allocation and expenditure of Perkins funds.
- Comparison of budgeted vs. actual expenditures.

2. Financial Statements

- Annual financial statements.
- Audit reports from independent auditors.

3. Grant Management Records

- Summary of internal controls and financial management systems.
- Records of any financial adjustments or corrections made.

4. Financial Subrecipient Monitoring

- Each grant category will be monitored once every three years.

Programmatic

1. Career & Technical Education Programs

- Labor market need for the program
- Program curriculum and courses with learning outcomes
- Program outcomes (graduate employment, earnings, employer satisfaction)

2. Faculty Professional Development

- Faculty professional development requirements
- Annual report of all faculty professional learning outcomes and activities

3. Facility Reviews

- Compliance with Americans with Disabilities Act for physical accessibility for all campus sites.

4. Perkins Data Monitoring

- Regular review of submitted Perkins data to evaluate whether information is consistent and adequate (e.g., special population reporting).

Other Documentation

1. Monitoring Reports

- Summary of reports from state or federal monitoring visits.
- Documentation of responses to any findings or recommendations.

Proactive Monitoring

Assess grant spend down for each Perkins grant application on January 5th of each year. If a college has spent less than 35% of the total project budget for any grant, then the CTE State Director will reach out to the college's lead Perkins contact to learn more about spending across the college's Perkins grant categories and if additional conversation(s) is needed for a specific category. This initial email will include:

- Total amount reimbursed thus far and the total amount awarded for each Perkins grant category.
- Asking whether all expenditures have been reimbursed/claimed thus far by the college?
- If there are revisions that have been submitted prior to January 5, does the college feel that the spending will get on track with the revision plans?

If the college has spent at or more than the above threshold, but this has not yet been claimed via the SFR, then this ends the proactive monitoring.

If the college has spent less than the above threshold, then this will result in scheduling a 30-minute MS Teams call with the WTCS Perkins Grant Manager and the college's grant leads (designated 'grant contact' and 'project manager') to discuss:

- How is the grant going thus far?
- What is the plan for spending down the rest of the grant within the fiscal year?
- Is a revision needed?
- Is there any technical support the college needs for this work?

Risk Monitoring

If a college misses a Perkins Indicator target by more than 5% of the target goal, for any federal indicator (1P1-3P1) two years in a row, then the System Office Perkins team will schedule a meeting(s) with the College's Perkins team for technical assistance to help identify promising practices that will improve the indicator level.

Timeline: The college's indicator performance is assessed each fall after the Perkins Dashboard data source has been updated with Client and external data. Once it is clear that a college would need to submit an improvement plan for a Perkins indicator for the second year in a row, we will reach out to schedule a virtual MS Teams meeting (late October, early November).