

Montana Carl D. Perkins Policy and Procedures Manual

Subject: State Administration
Procedure: Perkins Calendar
Effective: July 1, 2007
Revised: January, 2011

State Administration:

Perkins Management Calendar			
Month	Event	Date Due	Deliverables
January	Summaries of Leadership Planning research and Priority Setting Meeting agenda posted to the OCHE Workforce Development website.	2 nd week in January	All documents to be reviewed for Prioritization Meeting.
	Annual Priority Setting Meeting	4 th week in January	A list of agreed upon priorities and associated activities for the new grant year.
February	Creating the Perkins Leadership Plan for the new grant year based on the agreed upon priorities.	February 15	Draft Perkins Leadership Plan
	CTE Advisory Committee review of Perkins Leadership Plan.	3 rd week in February	Adjustments made if necessary and finalized Perkins Leadership Plan posted on the OCHE Workforce Development website.
March-July	Federal Perkins Allocation for the new grant year arrives and is distributed	Early March	The Perkins Federal Accountant will calculate the allocations per funding category within 2 business days.
	Technical Assistance for all Perkins eligible local recipients grant applicants	End of March	Provided VIA group TA sessions or individual assistance based on set criteria available to all grantees.
	Perkins Reserve & Leadership funds available for eligible local recipients to assist the state in meeting the prioritized objectives of the Perkins Leadership Plan	Early April	Requests for proposal, formula allocations or contracts finalized and distributed to local eligible recipients. Deadlines for these proposals will be 30 days after the notice date.
	State Plan revisions submitted to OVAE	April 1	Report as prescribed by OVAE

Perkins Management Calendar			
Month	Event	Date Due	Deliverables
	All local grant applications, allocations or contracts due and approved.	May 31	Funds will be awarded or approved by this date.
	New Grant Year begins	July 1	
September	Performance Improvement Plan	September 30	State plan to improve performance based on indicator results that did not meet 90% of the Federal Agreed Upon Performance Levels.
November - December	Consolidated Annual Report (CAR) – information gathering and narrative	Throughout November	Data, narrative and fiscal information can be reported throughout the year as action items are accomplished.
	State Plan Review – The plan will be divided into four sections for review by Perkins Staff. An action plan will be developed to address plan revisions.	Throughout December	Action items to be presented during the Annual Priorities Setting Meeting with the Advisory Council
	CAR Deadline	December 31	CAR forms may be completed online after September. Montana has an internal state deadline of December 15.
	Information gathering for Perkins Staff and the Advisory Committee to be used in the Annual Priority Setting Meeting.	December 31	<ul style="list-style-type: none"> • Indicator results • Indicator result summaries & conclusions • Non-local application Perkins funded activity results • Partnership needs: MOA, SWIB, ARA, etc. • State Plan revisions • State Improvement Plan (if any) • Summaries of Technical Assistance, Monitoring Visits, and Professional Development issues.

Secondary Local Application Grant Calendar:

[E-Grants Calendar:](#)

[OPI Federal Grants Calendar: Section 100](#)

Secondary Career and Technical Education			
Month	Event	Date Due	Deliverables
Jan.	State CTE Participation Report link e-mailed to districts	End of month	On-Link
Feb.	State CTE Participation Reports DUE	End of month	On-Link
March	Spring Accountability Data Collection begins	March 1	AIM System
	Perkins <i>Intent to Apply</i> available	Mid-month	E-Grants
April	Perkins <i>Intent to Apply</i> DUE	Mid-month	E-Grants
	Spring Accountability Data Collection DUE	April 30	AIM System
May	Perkins grant application opens	Mid-month	E-Grants
July/ June	Last day districts can obligate Perkins funds	Mid-month	
Aug.	Fiscal Closeout Reports due for Perkins projects ended June 30	August 10	
Oct/Sept	Perkins on-line application DUE	Sept 15	E-Grants
	Fall Accountability Data Collection begins	October 1	AIM System
Dec /Nov	Fall Accountability Data Collection DUE	Dec 31	AIM System
	Consolidated Annual Report (CAR) & ED Facts Reports due to OVAE	Dec 31	Coordinate CAR with post-secondary

Postsecondary Local Application, Reserve & State Leadership grants Calendar:

Postsecondary Perkins Grant Calendar

Month	Event	Date Due	Deliverables
January	Quarter 2 Fiscal Report - Personnel must be at least 40% spent at the end of quarter 2.	January 31	Quarterly report submitted by the institution Fiscal Manager to the OCHE Federal Accountant.
	Equipment over \$5000 and Minor Equipment over \$500 must be purchased and installed for all Perkins grantees to avoid losing funds.	January 31	Receipts turned in with 2 nd Quarter Fiscal report.
	Local Application previous term reports due.	January 31	Fall Student & Term files due. If previous term files are missing, previous calendar year files due in preparation for allocations.
February	Local Application program table additions and modifications.	February 10	Signed Program Verification Form
	Local Application previous year student enrollment verified.	February 28	Signed PELL/BIA Verification Form
	Local Application special populations information submitted.	February 28	Special Populations file place on KNOX secure server
March	Local Applications, competitive requests for proposal, contracts and other formula allocations distributed.	Mid March	Applications posted on OCHE website .
	Technical Assistance for grant applicants	Mid March	Group TA sessions or individual assistance based on set criteria available to all grantees.
April - May	Applications are due 30 days after allocation or RFP notice date.	End of April or Mid May	See application request for proposal or notice.
	3 rd Quarter Fiscal Report for Project and Fiscal Managers & Final Budget Revisions requested and completed.	April 30	Project Managers will be required to enter the 3 rd quarter Fiscal Summary & Budget Revisions in the Perkins IV Data System.
	Applications reviewed, approved or awarded.	Throughout May	Award notifications and contracts will be finalized by the end of May.
July	New Grant Year begins	July 1	
	Encumbrance Email	Mid July	Grantees must email the OCHE Federal Accountant to identify if any funds for the previous grant year will be encumbered or returned to OCHE to be redistributed.
	Local Application previous term reports due.	Mid July	Spring Student & Term files due.
	Local Application student completer file submitted.	End of July	Student Completer file placed on KNOX secure server.

Postsecondary Perkins Grant Calendar

Month	Event	Date Due	Deliverables
August	Local Application student placement matching information obtained from National Student Clearinghouse, Department of Labor Unemployment Division, MUS Data Warehouse and Federal Employment Data Exchange System.	Throughout August	Indicator reports published in September.
	Local Application and competitive application final reports and final fiscal reports due.	August 31	Final reports must be submitted to the OCHE Perkins Coordinator on or before this deadline.
September-Year End	Previous year results published.	Mid September	All indicator and performance reports will be published and available on the grant database. Choose the 3 rd tab labeled student reports.
	Previous term reports due.	Mid September	Summer Student & Term files due.
	Local Improvement Plans submitted if performance indicator goals from the previous year project were not met.	September 30	Local Improvement Plans from identified recipients completed using the Step 7 form in the grants database.
	Local levels of performance negotiated.	September 30	Negotiated levels will be posted by mid September for the following grant year. Levels will be finalized by September 30.
	Performance Reviews based on risk assessment factors	As scheduled	Notices emailed to the Grant Managers will detail the review requirements.
	1st Quarter Fiscal Report – Fiscal Managers only	October 31	Quarterly report submitted by the institution Fiscal Manager to the OCHE Federal Accountant.