

Montana Carl D. Perkins Policy and Procedures Manual

Subject: State Administration
Policy: State Plan Program Evaluation
Effective: July 1, 2007
Revised: Not Applicable

The Office of the Commissioner of Higher Education (OCHE) and the Office of Public Instruction (OPI) teams will conduct a thorough evaluation of the programs, services and activities of the state plan annually. This process is called the Montana Career and Technical Education (CTE) Evaluation and Revitalization Process. The products of this process are the Consolidated Annual Report (CAR) for the Office of Vocational and Adult Education (OVAE) and the Annual Perkins Leadership Plan.

Procedure:

Montana secondary, postsecondary and CTE constituents will complete the following activities by December 31 of each year to evaluate the effectiveness and results of the program, services, and activities within the state plan:

- The current Perkins State Plan will be reviewed. Proposed changes will be divided into revisions that must receive a public hearing, and non-substantive changes are submitted to be approved by OVAE.
- Indicator data and other pertinent data will be reviewed and summarized to identify state-level issues impacting the majority of secondary or postsecondary grantees, such as deficits in program or indicator trends.
- State and Local Improvement Plan progress will be reported and a revised plan proposed if appropriate.
- Unresolved or recurring technical assistance issues will be summarized.
- Grantee monitoring visit issues, resolutions, forms, procedures and trends will be conducted if pertinent.
- The Professional Development Plan for the previous year will be reviewed for effectiveness, and a summary of training needs will be identified.
- Issues identified by partner agencies or groups, and collaborative legislation such as State Workforce Investment Board (SWIB), Inter-Agency Rapid Response Team, Making Opportunity Affordable (MOA) Grant, Montana Transfer Initiative, American Recovery and Reinvestment Act of 2009 (ARRA), No Child Left Behind (NCLB), High School Redesign will be summarized.

The results of the program evaluation will be summarized in the CAR. The CAR is divided into five sections and is coordinated by the OCHE Accountability Specialist for the State Director's submission to OVAE by December 31 of each year. The OPI

Perkins Accountability Specialist coordinates the secondary portion of the narrative and submits required secondary data. The following required information is submitted through an online system [CAR Homepage](#) (see the OCHE Perkins Program Coordinator for a password):

- Cover page – OCHE Perkins Accountability Specialist
- Narrative –A summary of activities for each State Leadership required or permissive use and other OVAE requirements
- Fiscal Reporting
- Secondary and postsecondary indicator data, participant enrollment, career cluster enrollment for concentrators and Tech Prep data for each secondary and postsecondary indicator
- Tech Prep indicators

The next step in the CTE Evaluation and Revitalization Process is the Perkins Leadership Planning Meeting. Summaries of the above activities will be reviewed by the State Executive Leadership Team (SELT). An agenda for the Annual Perkins Leadership Planning meeting will be prepared and appropriate documents will be made available for the CTE Advisory Committee and placed on the OCHE website. OCHE and OPI Teams will meet annually with the CTE Advisory Committee to obtain advice on priorities for state activities. OCHE and OPI Teams will utilize the priorities to develop the Perkins Leadership Plan. The plan will provide a prioritized plan of activities for each of the Perkins funding categories. The plan will detail an operational plan to include applications, Request for Proposals (RFPs), contracts and formulas to be developed and timeframes along with expected outcomes. Whenever possible, funds will dovetail efforts to strategically implement initiatives through multiple funding categories.

Perkins designates categories of funding within each state allocation to serve specific purposes, populations or initiatives. The following is a summary of how the state allocation is divided and to be used.

Funds to be used by local eligible institutions:

85% of the funds allocated to the state based on a federal formula must be distributed to local eligible recipients. The funds must be distributed to local high schools or two-year postsecondary colleges based on formulas detailed in the Perkins Law. The State may provide restrictions, maximum or minimum limits on local and/or reserve funds. The local eligible agency may implement the restrictions or limitations within the parameters of the required and permissive uses.

Local Application Formula Grants:

These funds are awarded to eligible high school districts and postsecondary, two-year institutions (Community Colleges, Colleges of Technology and Tribal Colleges) to support career and technical education programs. These funds should be used by local project grantees to meet data identified needs,

aligning with the purpose of the Perkins Act and within the parameters of the required and permissive uses of funds.

Reserve Grants:

Up to 10% of the local allocation funds may be reserved to focus on specific initiatives or local performance indicators. These funds may be distributed competitively or through a formula allocation. In either case, the awardees must be Perkins eligible institutions, e.g., a high school district, two-year postsecondary college or consortia of eligible institutions.

State Leadership Funds

Up to 10% of funds allocated to the state may be used for state leadership activities. These funds may be used for state level activities to fulfill the purpose of the law and meet performance indicator goals established for secondary and postsecondary. Leadership funds may be spent as deemed appropriate and effective by the State Executive Leadership Team with guidance from the State CTE Advisory Council documented in the Annual Perkins Leadership Plan. However, the law also specifies the following recommended and required uses for a portion of these funds.

Non-Traditional Fields Funds:

The Perkins law requires not less than \$60,000 and not more than \$150,000 of leadership funds shall be available for services that prepare individuals for non-traditional fields. Nontraditional is defined as programs that prepare students for occupations where either females or males make up less than 25% of the total workforce for that job. Examples would be males in nursing or females in welding. A complete table of nontraditional occupations, and Classification of Instructional Programs (CIP) can be found on the OVAE accountability website, [Peer Collaborative Resource Network \(PCRN\)](#). The list has also been loaded into the CIP table in the grant database.

Institutions Funds:

The Perkins law allows states to allocate up to one percent (1%) of their leadership allocation to State institutions, such as State correctional institutions and institutions that serve individuals with disabilities. These institutions must include residential services, directly receive state and/or federal funding and offer career and technical training programming in coordination with a Perkins eligible high school or two-year college.