



# **PERKINS CLNA & GRANT APPLICATION TRAINING**



# MEET THE TEAM!

LETHA BAUTER - FEDERAL PROGRAMS MANAGER

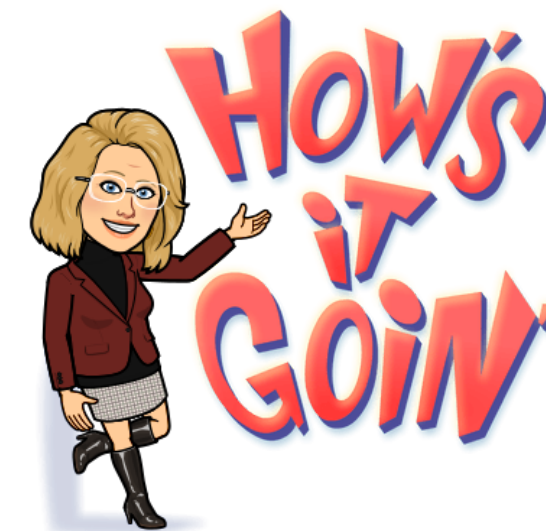
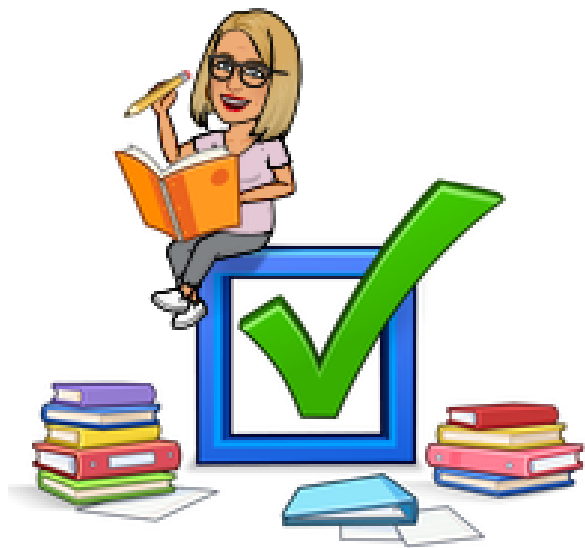
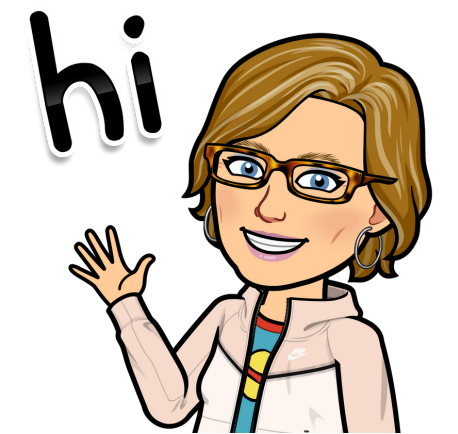
STEVE ROBISON - PERKINS COMPLIANCE MANAGER

SHELBY SANDERS - SOUTHERN GRANT COORDINATOR

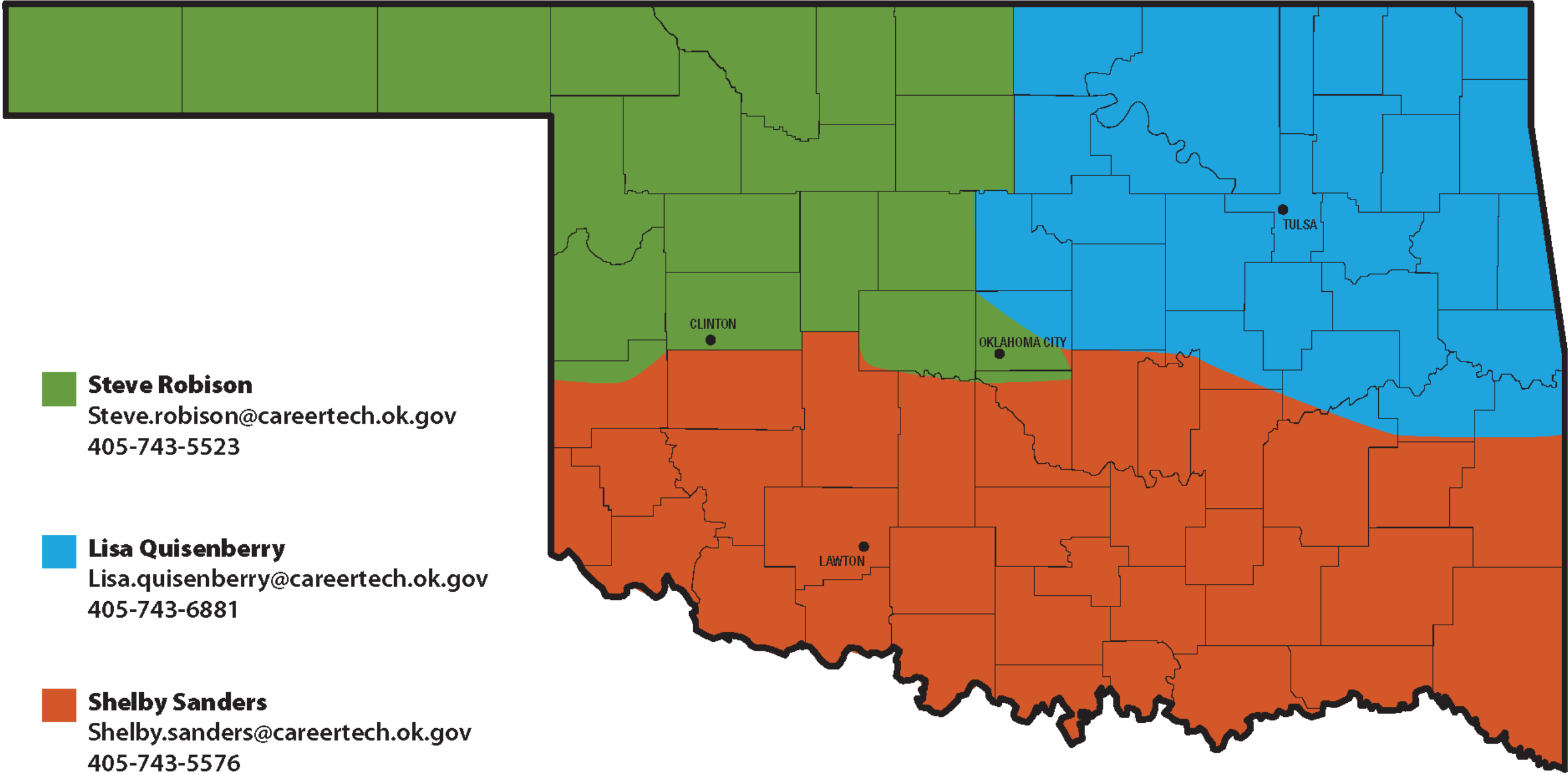
LISA QUISENBERRY - NORTHEAST GRANT COORDINATOR

JORDAN DUCK - INNOVATIVE GRANT COORDINATOR


DENISE BETHKE - FINANCIAL ANALYST



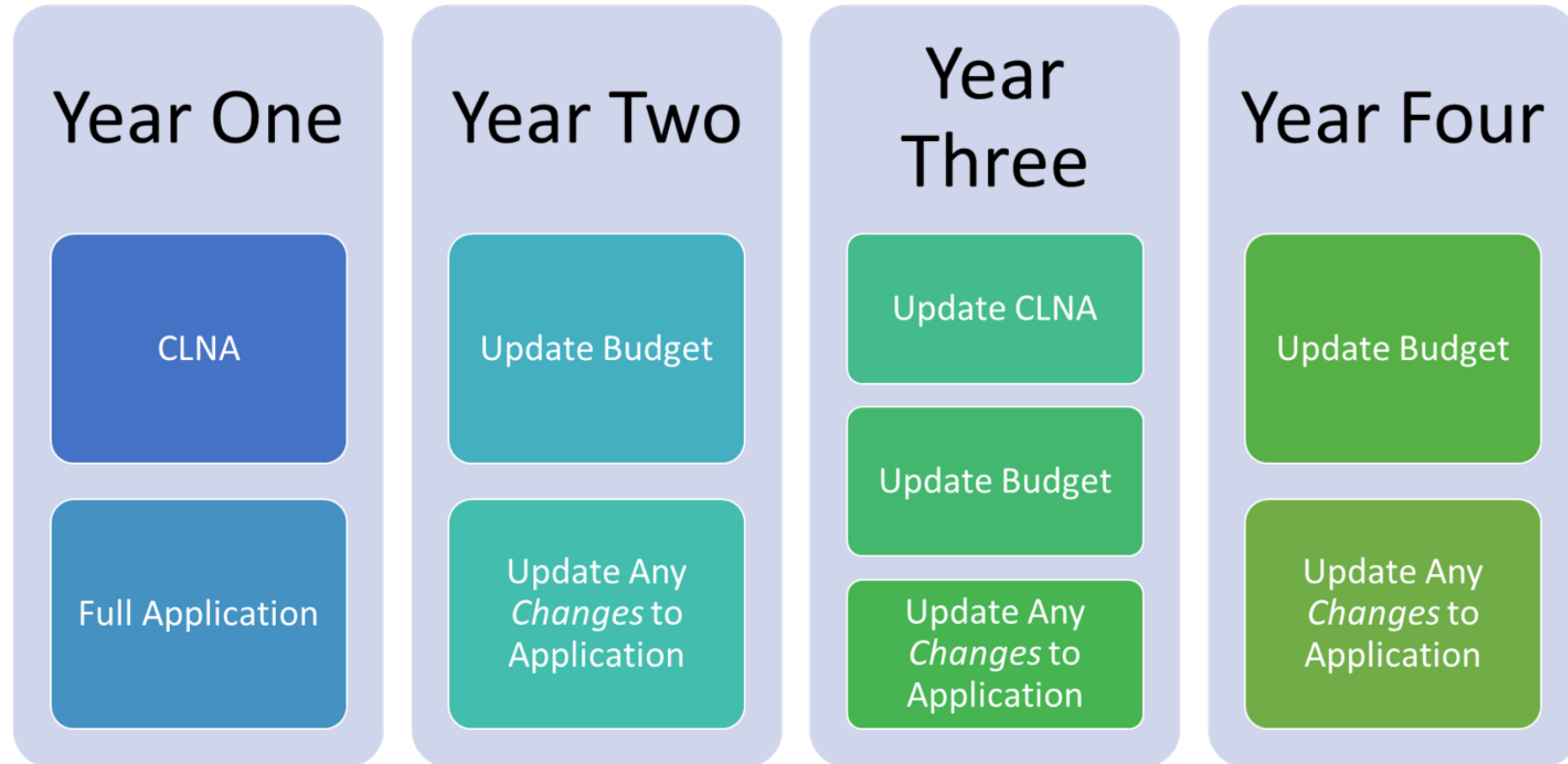
# REGIONAL MAP



# AGENDA

- Comprehensive Local Needs Assessment (CLNA)
  - Local Application
  - Lunch (on your own)
  - Innovative Grants
  - Invoicing Process and OCAS Codes
- 

# FOUR YEAR CYCLE



# Important Dates

First Week of March - Grants Open



Mid-March - Allocation Notices Emailed to Superintendents



May 3rd - Grants Close



July - Approval/Incomplete/Rejection Notices



# Comprehensive Local Needs Assessment (CLNA)

Steve Robison



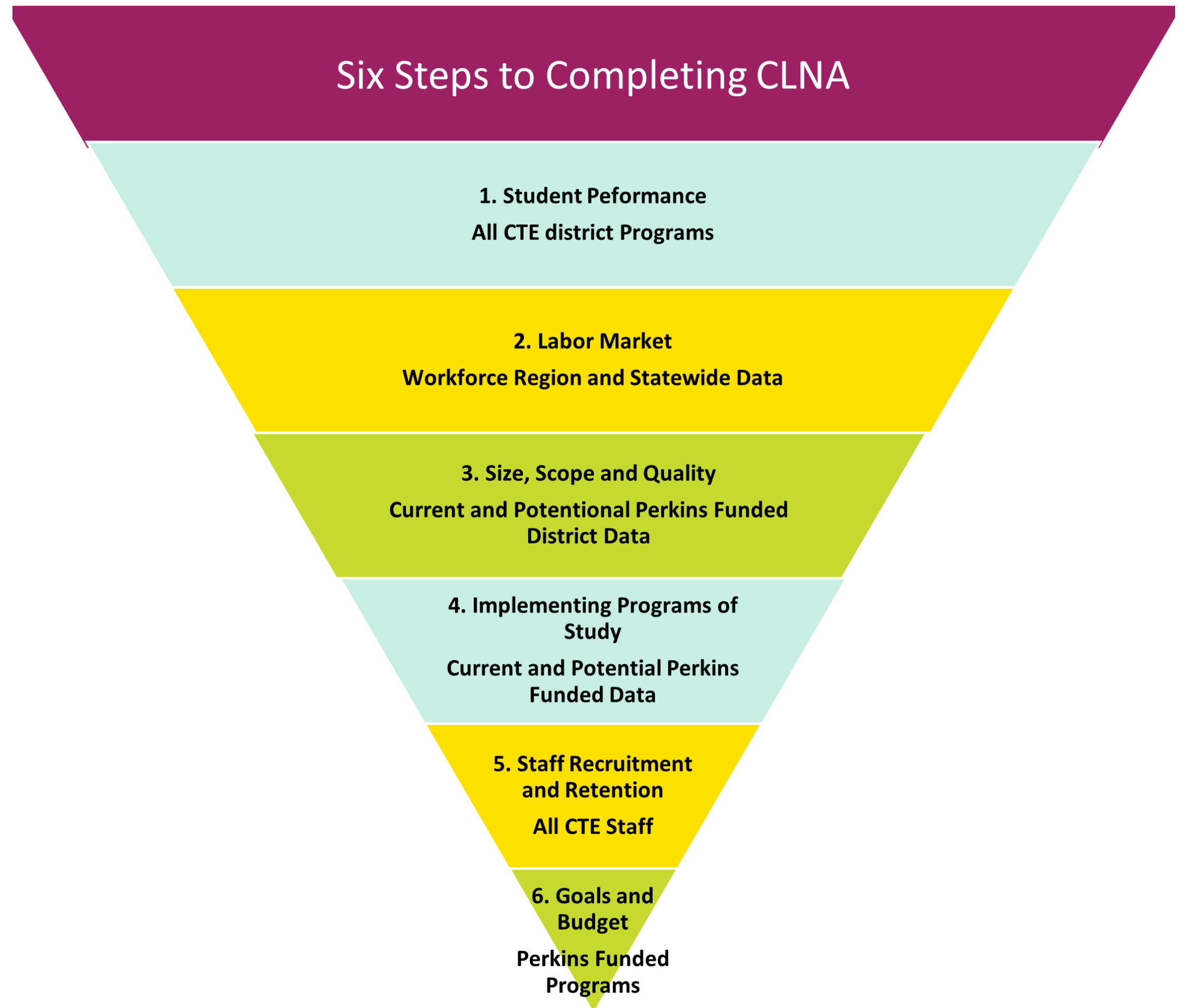
# CLNA PURPOSE

**CLNA IS THE FOUNDATION OF THE LOCAL & INNOVATIVE APPLICATIONS.**

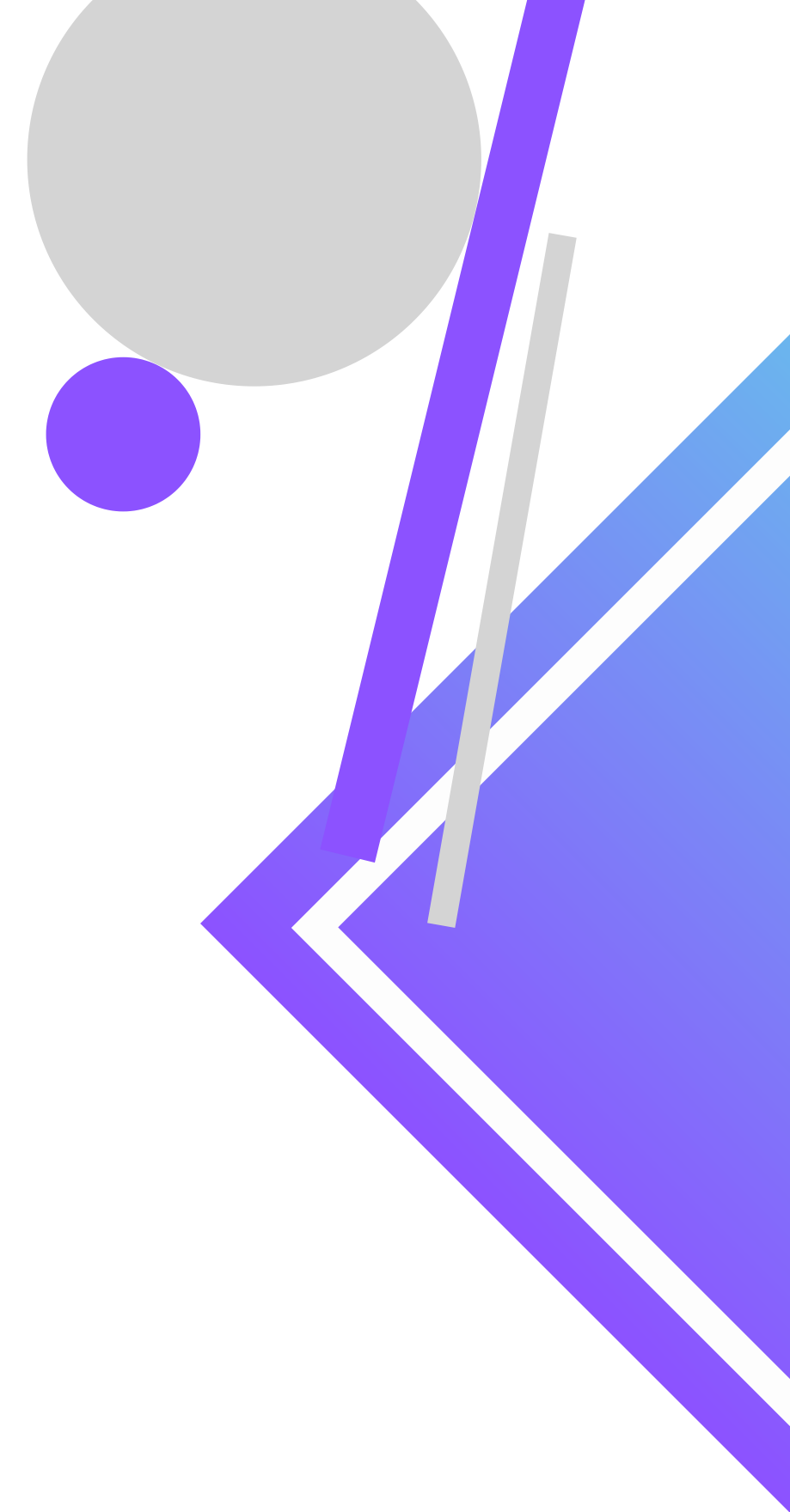
- Stakeholder Involvement
- Data Driven Decisions
- Labor Market Alignment
- Focus on Work Based Learning
- Improving Student Performance
- Ensure budget request supports priorities



# SIX STEPS



# CLNA OVERVIEW





**TEN MINUTE  
BREAK**

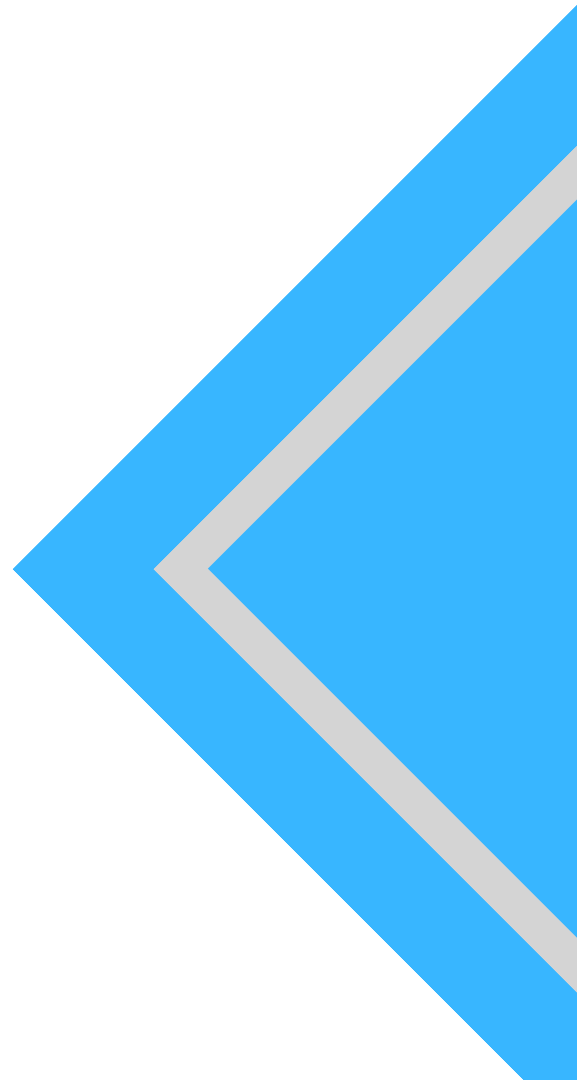


# Local Application

Jordan Duck & Steve Robison

# Purpose

- 
- ✓ Develop challenging academic and technical standards that will prepare students for high skill, high wage, and in-demand occupations
- 
- ✓ Support partnerships between secondary schools, technology centers, and post-secondary institutions
- 
- ✓ Funding decisions must be driven by identified needs, gaps, or opportunities for improvement
- 
- ✓ Strengthen CTE programs
- 



# General Information



Complete Worksheet in Word then copy/paste in CTIMS

Ensure all CTIMS roles are assigned and passwords are current

Funding decisions must be driven by identified needs, gaps, or opportunities for improvement

# Grant Process

All FLA grant processes are completed in CTIMS  
(CareerTech Information Management System)

Worksheet (Application)



Agreement



Invoices (Reimbursement)

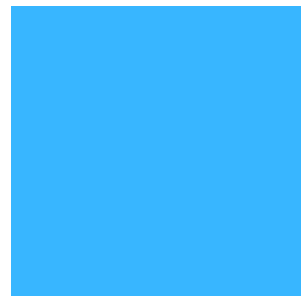
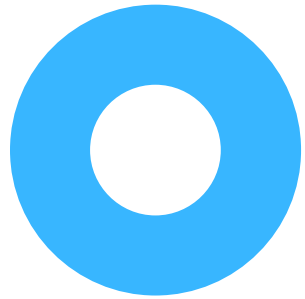
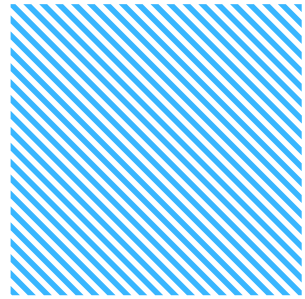
# CTIMS Roles

**Local Initiative Coordinator:** Creates and prepares worksheet in CTIMS

**Local Finance Coordinator:** Prepares Budget, enters in OCAS codes during agreement, and submits invoices for reimbursement

**Local Superintendent/President:** Final approval of worksheet at local level





# YEAR ONE REQUIREMENTS

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- Complete a new CLNA
- All sections must be complete
- Provide Programs of Study for all funded areas

# APPLICATION OVERVIEW

- Section 1 - Federal Financial Information
- Section 2 - CLNA
- Section 3 - Programs of Study
- Section 4 - Budget Narrative
- Section 5 - Organization Overview
- Section 6 - Itemized Budget Guidelines

# SECTION ONE

## Federal Financial Information

- Unique Entity ID (UEI)
- SAMS Registration Verified
- Zip Code
- Two Digit Congressional District Number

# SECTION TWO

## 2.1 - CLNA

- Copy priorities from CLNA
- For each priority listed you should:

Identify the gap/opportunity this priority addresses



Use CLNA data to describe how you determined this should be a priority



List all CTE programs affected by this priority

### Examples of gap/opportunities:

- Low academic proficiency in math
- Lack of technical skills for high skill, high wage, in-demand jobs
- High teacher turnover rate

# SECTION TWO

## 2.2 - CLNA

- List all priorities and the actions to accomplish them in appropriate step and fiscal year
- Complete sections for both 2024-2025 and 2025-2026
- Do not list individual items you will be purchasing - only list actions
- Steps without priorities may remain blank
- May have more than one priority per step

# SECTION TWO

## 2.2 - Example 1

[FISCAL YEAR 2024-2025]

**[Step 1: Student Performance Data]:** Priority 1: Increase student participation in Work-Based Learning: Action: Partially fund 2 counselors.

**[Step 2: State and Regional Labor Market Alignment]:**

**[Step 3: Size, Scope, Quality]:** Priority 3: Improve student preparation for high skill, high wage, in-demand jobs. Action: purchase high tech, industry standard equipment for automotive program.

**[Step 4: Implementing Programs of Study]:**

**[Step 5: Recruitment, Retention and Staff Training]:** Priority 2: Decrease staff turnover. Action: Provide relevant professional development for instructional staff.

# SECTION TWO

## 2.2 - Example 2

[FISCAL YEAR 2025-2026]

[Step 1: Student Performance Data]: Priority 1: Increase student participation in Work-Based Learning: Action: Partially fund 2 counselors. *(Repeated priority)*

[Step 2: State and Regional Labor Market Alignment]:

[Step 3: Size, Scope, Quality]: Priority 3: Improve student preparation for high skill, high wage, in-demand jobs. Action: purchase high tech, industry standard equipment for automotive program. *(Repeated priority)*

Priority 4: Improve local performance levels in reading. Action: purchase supplemental curriculum to assist student comprehension. *(New priority)*

[Step 4: Implementing Programs of Study]:

[Step 5: Recruitment, Retention and Staff Training]:



# SECTION THREE

## Programs of Study

- Submit at least one Program of Study for every program area utilizing funds, even if previously submitted
- Funding Guidance/Advisory position
- Must use approved POS template provided on Perkins website



# SECTION THREE

## 3.1 - Programs of Study

Indicate all CTE programs offered at your district - even if funding is not being requested for that program

- Include programs from all consortium members

# SECTION THREE

## 3.2 - Programs of Study

List the exact certification, license or Associate's degree shown on related Program of Study

- Must be industry recognized

Example:

Incorrect: Health - Nurse

Correct: Associate in Applied Science - Nursing

# SECTION THREE

## 3.3 - 3.4B

- Describe how you will inform students about CTE courses and POS
  - Include special population students
- Inform ODCTE if you're starting a new program during the next two fiscal years

If you answered “yes” to starting a new program (3.4), you're required to answer 3.4A and 3.4B.

# SECTION FOUR

## Budget Narrative

[4.0] – Provide us with a broad OVERVIEW of how you will be spending your Perkins funding for the next 2 YEARS AND what you expect the results of this funding to be:

[4.1] STUDENT PERFORMANCE:

Academic Integration (330)

Evaluation (337)

Secondary/Postsecondary Link (340)

[4.2] STATE AND REGIONAL LABOR MARKET ALIGNMENT:

Workforce Partnerships (338)

Services and Activities for HS/HW/I-D (339)

[4.3] SIZE, SCOPE, & QUALITY:

Work-based Learning (331)

Use of Technology (332)

[4.4] IMPLEMENTING PROGRAMS OF STUDY

Guidance and Counseling (334)

Career Awareness (335)

[4.5] RECRUITMENT, RETENTION AND STAFF TRAINING:

Professional Development (333)

Recruitment and Retention (336)

# SECTION FOUR

## Budget Narrative

- Discuss Perkins funding for next two fiscal years
- Only answer areas where your CLNA identified gaps or opportunities and which your school set as a priority for the next two years
- All expenditures must be clearly tied to at least one CLNA priority
- All items and number of items must be listed
- Related equipment may be covered by one narrative statement

Example:

BITE - Camera & Accessories  
(lenses, tripod, memory card,  
storage bag)



# SECTION FOUR

## Budget Narrative

- Provide a narrative for each expenditure stating how it will improve your CTE program in one or more of these areas:
  - Improve student academic performance
  - Increase student opportunities for high skill, high wage, or in-demand job
  - Improve student opportunities to obtain industry recognized certifications, licenses, or degrees
  - Increase recruitment or retention of staff members
  - Improve service to special population or non-traditional students
  - Enhance career exploration or development activities
  - Develop &/or implement labor market demand supported programs of Programs of Study



# SECTION FOUR

## Budget Narrative

### Consortium Example:

School Name - CTE Program - Item Name/Description: Narrative Statement

### Stand Alone Example:

CTE Program - Item Name/Description: Narrative Statement

- Example: Pearland School System - BITE – ICEV Student Curriculum: This curriculum can be accessed through a variety of technology devices allowing for distance learning opportunities. The web-based materials allow student exposure to current industry standards in high-skill areas and improve performance on certification testing.

# SECTION FOUR

## 4.0 - Budget Narrative

- Provide a broad overview of how you will be spending your Perkins funding over the next two years
- Do not list specific items
- State the expected results from funding



# SECTION FOUR

## 4.1 - 4.5 Budget Narrative

- List expenditures and narrative in the same steps as you did in Section 2.2.
- Leave section blank if not expending funds in that area

### [4.3] SIZE, SCOPE, & QUALITY:

Work-based Learning (331)

Use of Technology (332)

### [4.4] IMPLEMENTING PROGRAMS OF STUDY

Guidance and Counseling (334)

Career Awareness (335)

### [4.5] RECRUITMENT, RETENTION AND STAFF TRAINING:

Professional Development (333)

Recruitment and Retention (336)

# SECTION FOUR

## 4.6 - Budget Narrative

- Consortiums must answer both questions, 4.6 & 4.7
- List all schools, their ODCTE allocation, and the consortium budget

Example:

Paile - ODCTE allocation, \$8,972, Consortium budget, \$10,400

Alvin - ODCTE allocation \$18,749, Consortium budget, \$17,321

# SECTION FOUR

## 4.7 - Budget Narrative

Select the checkbox to indicate whether:

LFA will  
purchase all  
items and ship to  
member district

OR

Member districts  
will purchase their  
own items and be  
reimbursed by LFA

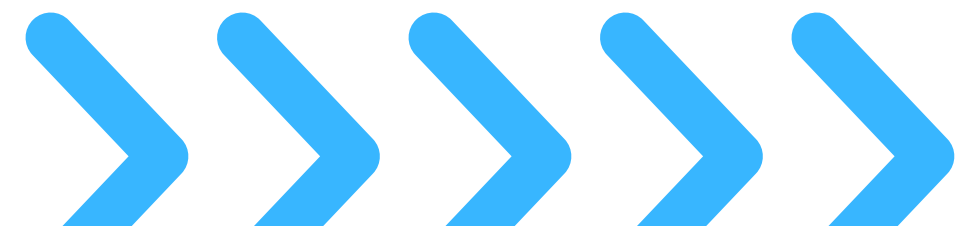


# SECTION FIVE

## Organization Overview

This section will address:

- The collaboration with local workforce boards and/or one-stop delivery systems and other stakeholder partners
- How your district will work with or provide opportunities for students in special populations
- Work-Based Learning
- CTE Staff Recruitment, Retention, and Training
- Student Performance Data



# SECTION FIVE

## 5.1 - 5.2 Organization Overview

How your district collaborates with stakeholders to provide career exploration and career development coursework, activities, or services.

How will you share information about high skill, high wage, in-demand job opportunities with students.

- Include suggestions from Stakeholders



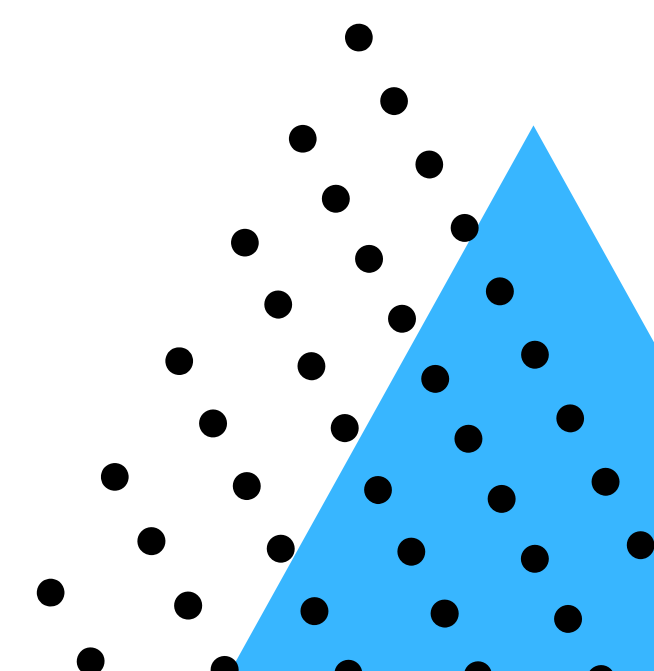
# SECTION FIVE

## 5.3 - 5.4 Organization Overview

How your district will provide career and academic counseling to students

- Before they enroll into CTE programs
- While they are participating in CTE programs

Describe how you will strengthen your CTE programs and provide challenging academic and technical content that results in a well-rounded education.



# SECTION FIVE

## 5.5 - 5.8 Organization Overview

Individuals with disabilities

Economically  
disadvantaged families

Individuals experiencing  
homelessness

Single parents including single pregnant  
women

Youth who are in or  
aged out of the foster  
care system

Youth with a parent who is a  
member of the armed forces and  
is on active duty

English learners

Students in non-traditional fields

Out-of-workforce  
individuals



# SECTION FIVE

## 5.5 - 5.8 Organization Overview

Describe how your organization will:

- Provide activities to prepare special populations for high skill, high wage, and in-demand occupations
- Prepare CTE special populations for non-traditional fields
- Provide equal access for special populations for CTE courses, programs and POS
- Ensure students will not be discriminated against based on their status as members of special populations



# SECTION FIVE

## 5.9 & 5.10 Organization Overview

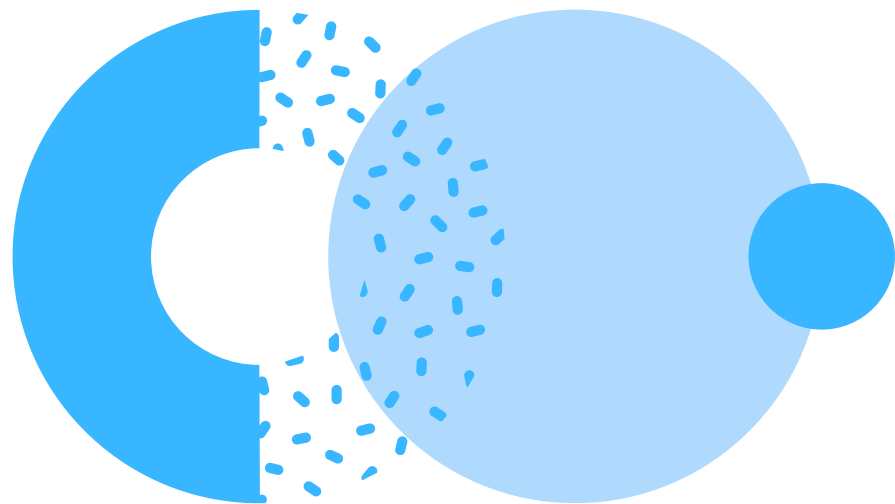
Work Based Learning is sustained interactions with industry or community professionals in real workplace settings (to the extent practicable) or simulated environments at an education institution that fosters in depth, first hand engagement with the tasks required in a given career field that is aligned to curriculum and instruction.





# SECTION FIVE

5.9 & 5.10 Organization Overview



Describe the work based learning opportunities that your organization will provide to students participating in CTE programs.



How will your organization work with employers to develop or expand work based learning opportunities?

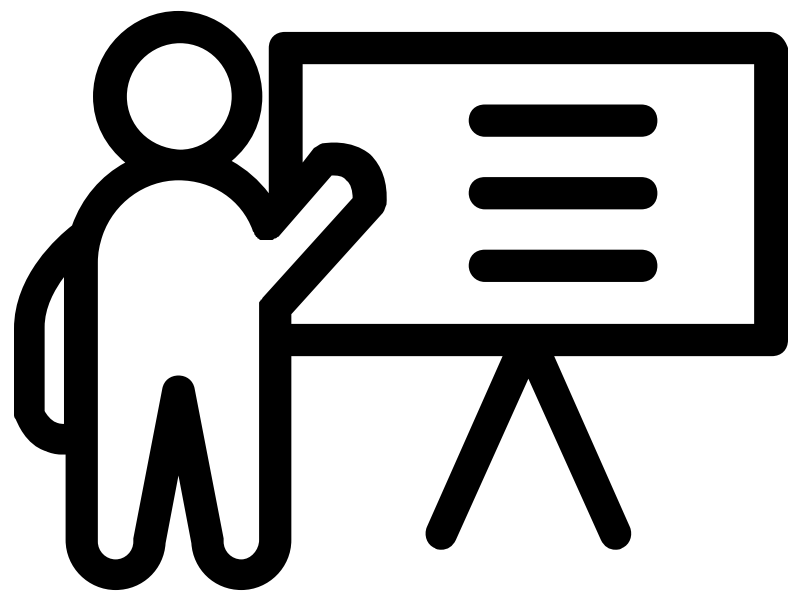
# SECTION FIVE

## 5.11 Organization Overview

How will your organization provide CTE students the opportunity to gain post-secondary credit while attending high school?

# SECTION FIVE

## 5.12 Organization Overview



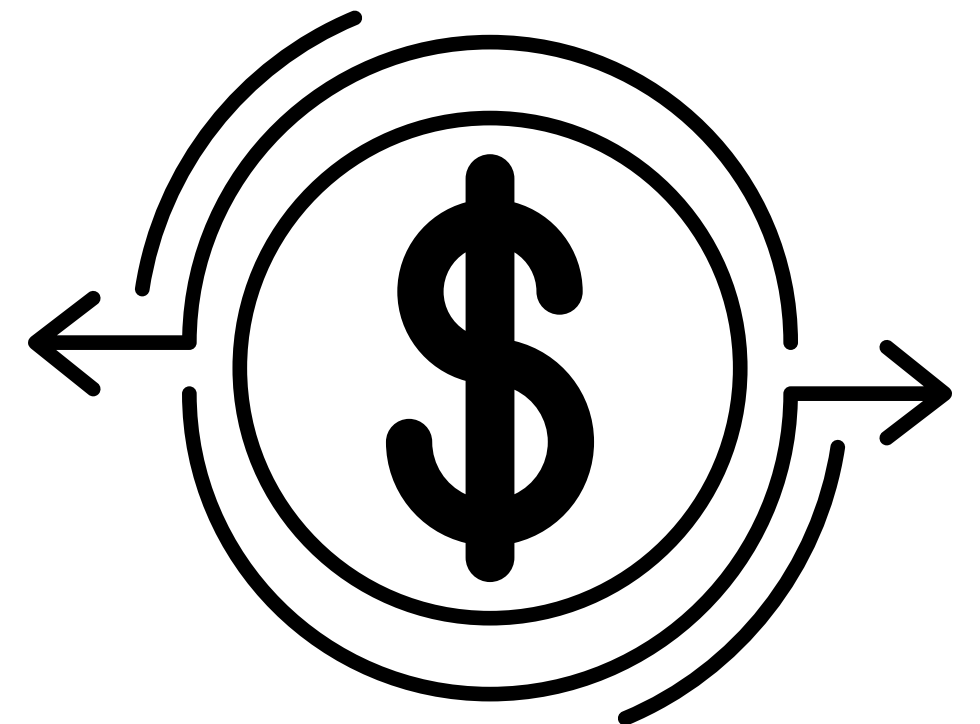
Provide a description of how your organization will coordinate with ODCTE and higher education institutions to support the recruitment, retention, and training (PD) of each group.

- Teachers or Faculty
- Administrators
- Support Personnel and Paraprofessionals
- Groups Underrepresented in the Teaching Profession

# SECTION SIX

## Itemized Budget or Budget Spreadsheet

- Budget entire allocation
- Be specific & descriptive. Include make and model when possible
- OCAS codes are added during agreement phase





# SECTION SIX

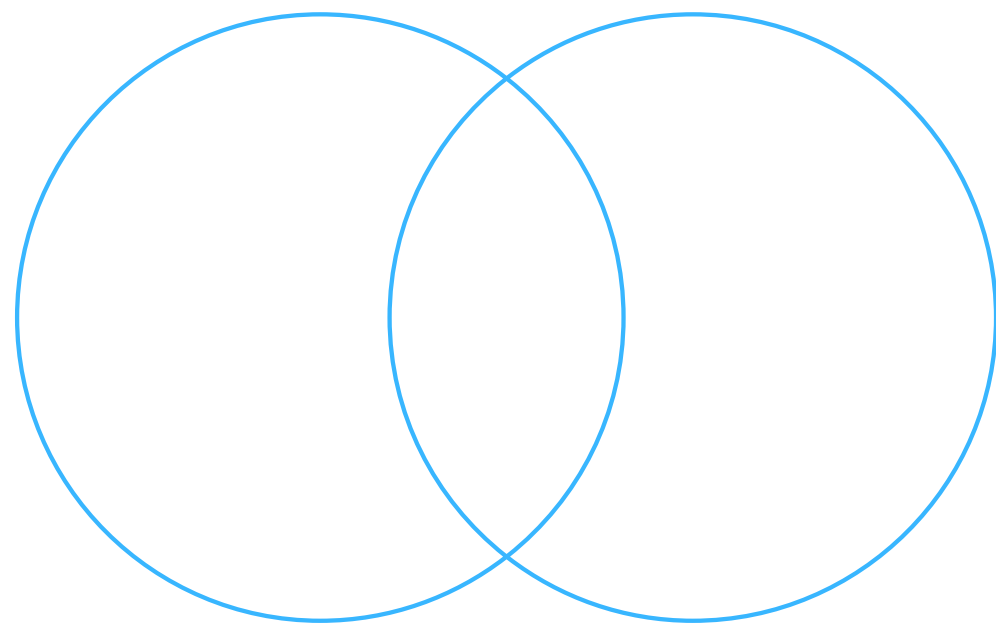
Itemized Budget or Budget  
Spreadsheet

Percentages of employee's total salary and benefits paid with Perkins funds should be listed at the end of the budget line description.

- Example: Counselor Salary (58%)
- Academic Center Specialists Benefits (26.5%)

Percentages cannot increase year-to-year due to Federal supplanting regulations

# ITEMIZED BUDGET



Items that are part of a system, or accessories should be listed on the same line item.

This includes:

- Shipping & Handling
- Palletizing
- Set-Up Fees
- Camera with lenses, memory cards, storage bags



# ITEMIZED BUDGET

Option One:

Line Description	Lenovo Thinkbook 15 Gen 2 Laptops
# of Required Units	7
Required Unit Cost	\$1,956.14
<u>Line Item Total</u>	\$13,692.28

# ITEMIZED BUDGET

Option Two:

Line Description (# units)	Lenovo Thinkbook 15 Gen 2 Laptops (7)
Required Units	1
Required Unit Cost = Total Expenditure	\$13,692.98
<u>Line Item Total</u>	\$13,692.98

# SECTION SIX

## Itemized Budget or Budget Spreadsheet

Stand Alone Example:

Budget Line Description	Req. Units	Req. Unit Cost	Req. Unit Type	Line Item Total
BMITE: Certiport License	1.00	\$18,123.50	Each	\$18,123.50
BMITE: iMacs	3.00	\$1,500.00	Each	\$4,500.00
FCS: Chromebooks (4)	1.00	\$2,694.16	Each	\$2,694.16
Instructional Staff Registration to TCEA (3)	1.00	\$2,784.00	Each	\$2,784.00
Indirect Cost	1.00	\$1,058.62	Each	\$1,058.62
Non-Instructional Staff Registration to TCEA	2.00	\$928.00	Each	\$1,856.00

# SECTION SIX

## Itemized Budget or Budget Spreadsheet

Consortium Example:

Budget Line Description	Req. Units	Req. Unit Cost	Req. Unit Type	Line Item Total
Colcord - Ag: Laser Engraver with rotary tool	1.00	\$8,931.99	Each	\$8,931.99
Oaks - BITE: Desktop Computers with mice, keyboards & adapters (6)	1.00	\$4,959.95	Each	\$5,771.91
Kansas - FCS: Cleartouch Interactive TV	1.00	\$5,771.91	Each	\$4,959.95
Keys - FCS: LG 29.7 cu.ft. Smart Refrigerator with 4 French doors, Instaview, wifi enabled	1.00	\$3,779.99	Each	\$3,779.99
Watts - Ag: Zmorph VX Multi tool 3D Printer Set	1.00	\$3,503.60	Each	\$3,503.60
Kansas - Ag: ICEV Teacher Curriculum	1.00	\$1,725.00	Each	\$1,725.00

# REQUIRED DOCUMENTS

Completed CLNA

All required Programs of Study

IDC Rate Sheet if applicable

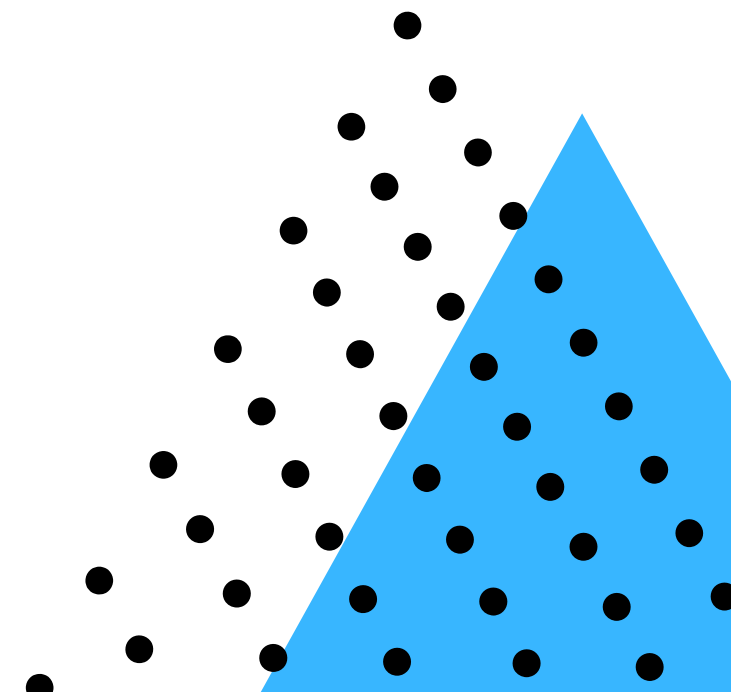


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the  
attachment  
feature in  
CTIMS

# MONITORING

All districts will be monitored once every five years

Desk Audits, Technical Assistance, In-Person Visits





**TEN MINUTE  
BREAK**



# Innovative Grants

Jordan Duck



# Purpose



Develop new and sustainable projects for high need areas

More innovative projects than standard classroom projects

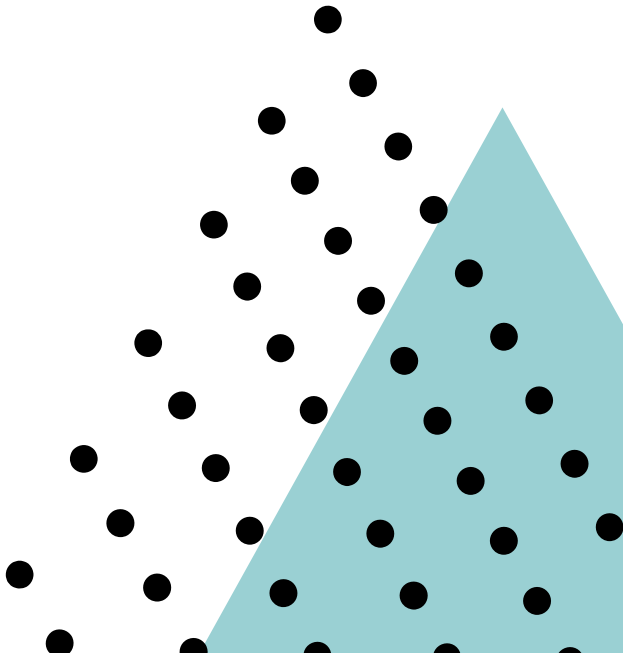
# FUNDING AVAILABLE

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15% of Perkins  
Allocation

\$2.1 million  
available in FY22

\$2.2 million  
available in FY23





# GRANT OVERVIEW

Two Year Cycle

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Request Amount

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Sustainable Projects

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Project Sharing

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Required Mid-Cycle Monitoring and  
End of Cycle Review



# GRANT OPPORTUNITIES

**CAREER DEVELOPMENT AND  
PROGRAMS OF STUDY**

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**SUPPORTING CTE SPECIAL  
POPULATIONS**

---

**HIGH GROWTH AND EMERGING  
TECHNOLOGY**

---

**IMPROVING ACADEMIC  
PROFICIENCY**

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**CAREER PATHWAYS, WORKFORCE,  
AND INDUSTRY PARTNERSHIPS**

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**INNOVATION IN CAREER  
EXPLORATION**

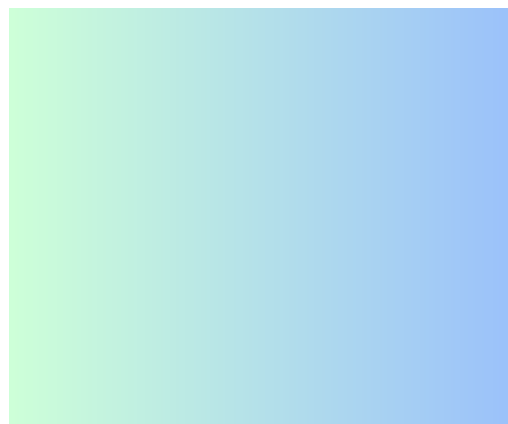
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**INNOVATIVE STRATEGIES TO RECRUIT  
AND RETAIN CTE INSTRUCTORS -  
OTHER**

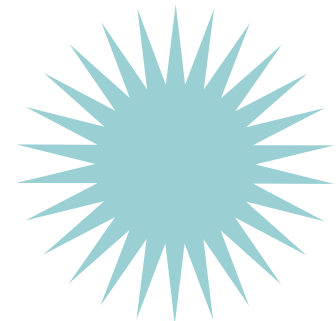
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**CTE NEW PROGRAM**

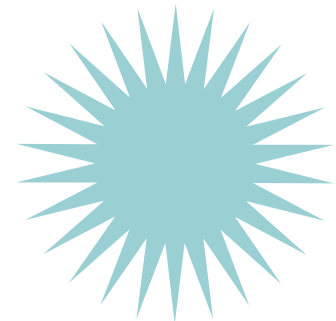
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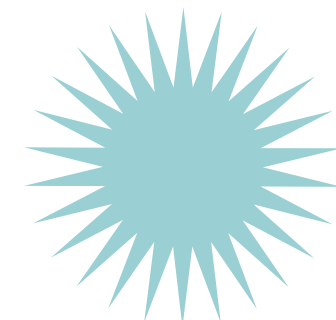
# CAREER DEVELOPMENT AND PROGRAMS OF STUDY



Designed to assist individuals in making career choices and creating full Programs of Studies that will prepare them for those careers.

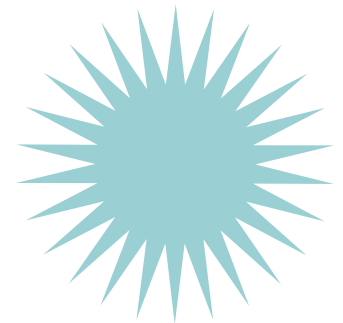


Examples: RoadTrip Nation Curriculum, ASCA Training, College and Career Advisor

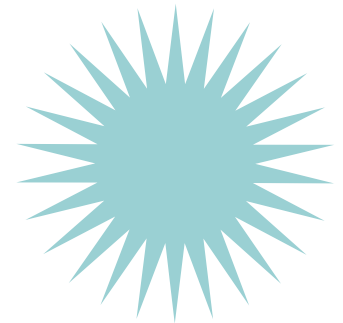


Up to \$50,000 for year one and up to \$50,000 for year two

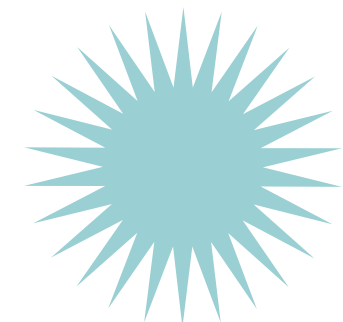
# SUPPORTING CTE SPECIAL POPULATIONS



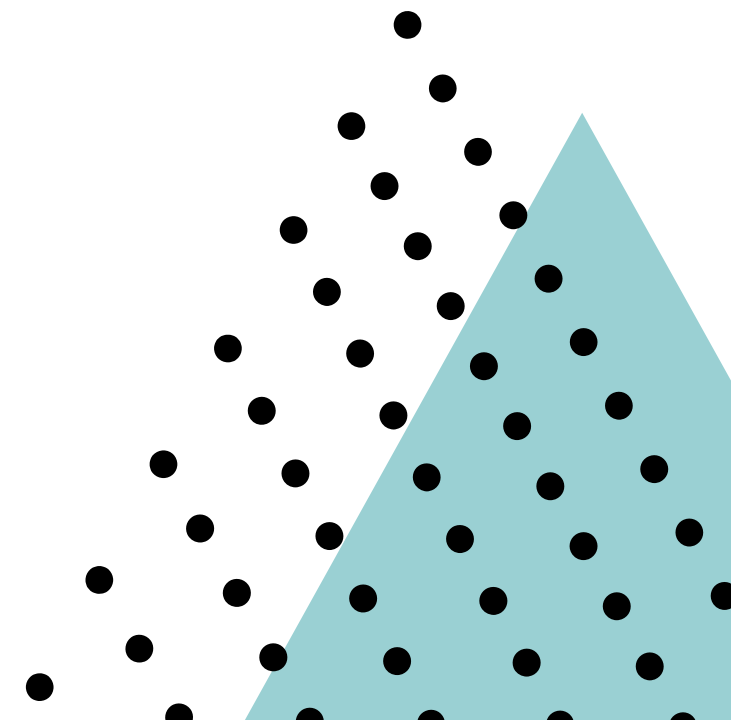
Used to support special population ODCTE students explore career options and transition into post-secondary education, training, or employment.



Examples: Innovative Adaptive Equipment, MiFi's, CERT Culinary Program



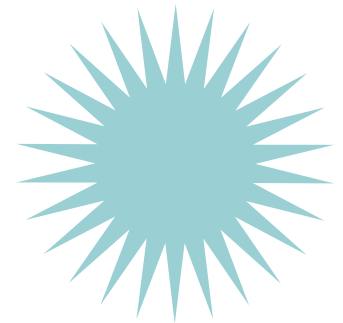
Up to \$50,000 for year one and up to \$50,000 for year two



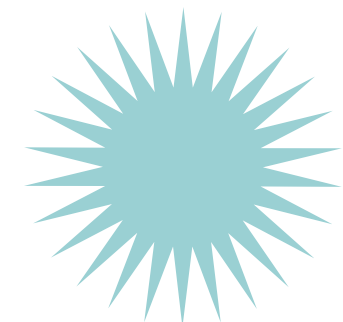
# HIGH GROWTH & EMERGING TECHNOLOGY



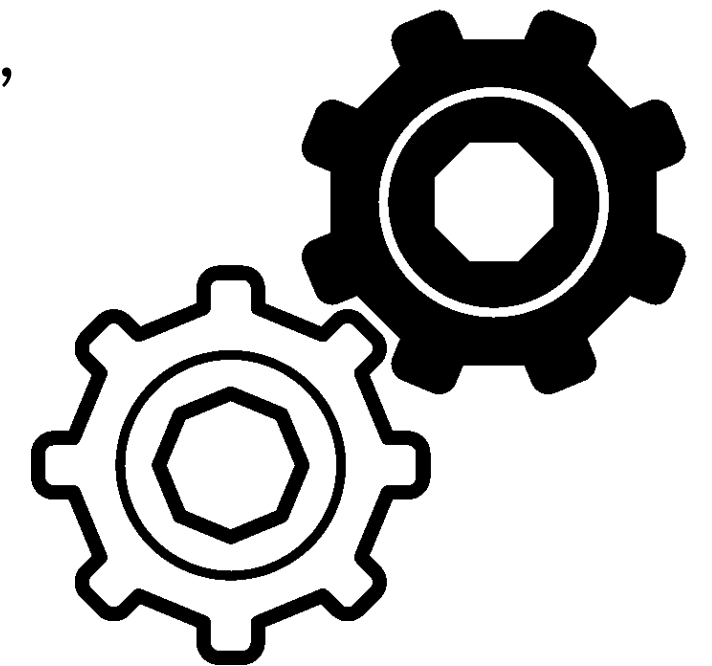
Implement innovative CareerTech programs that embrace rigorous academics and technical learning skills that align with emerging workforce needs and lead to high skill, high wage job opportunities.



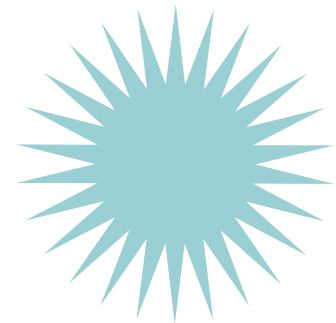
Examples: Electric Vehicle Maintenance Curriculum and Equipment, VR Coding, Develop Aerospace Program



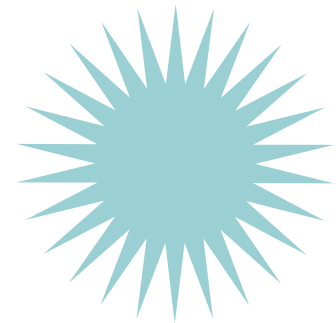
Up to \$50,000 for year one and up to \$50,000 for year two



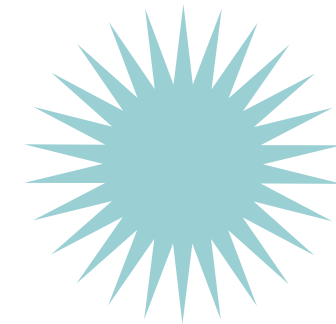
# CAREER PATHWAYS, WORKFORCE, AND INDUSTRY PARTNERSHIPS



Supports the development of new, innovative career pathways or partnerships that lead to high skill, high wage, or in-demand occupations.



Examples: Career Development and Community Outreach Advisor, Thunder Partnership to enhance broadcasting program

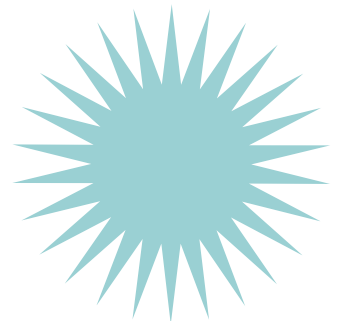


Up to \$50,000 for year one and up to \$25,000 for year two

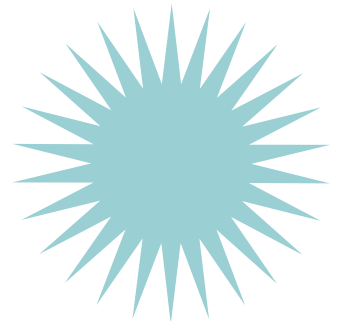




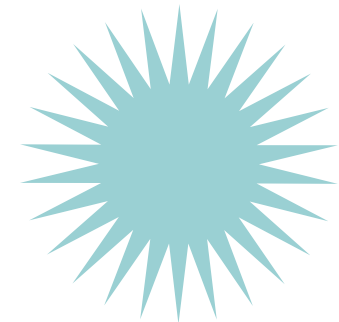
# INNOVATION IN CAREER EXPLORATION



Designed to develop middle school STEM exploratory programs that utilize project-based learning and increase academic rigor and student achievement.

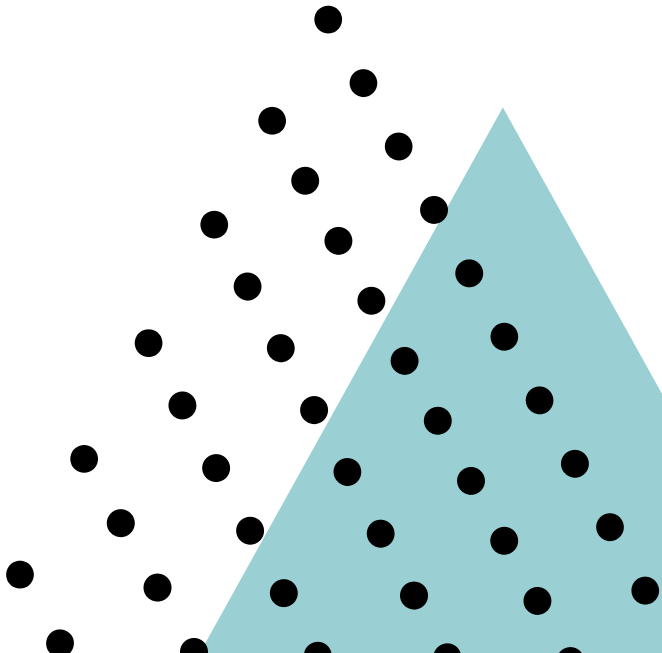


Examples: PLTW Curriculum, App Creation, New STEM Programs

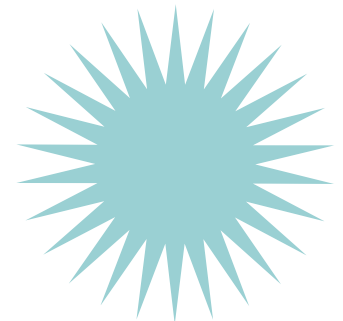


Up to \$50,000 for year one and up to \$50,000 for year two

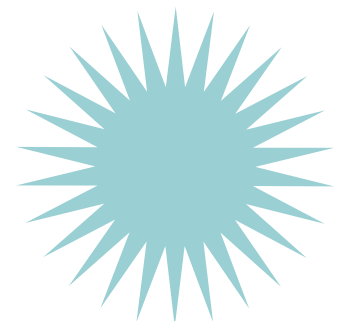
New for FY25!



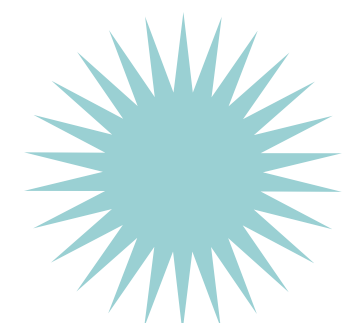
# INNOVATIVE STRATEGIES TO RECRUIT AND RETAIN CTE INSTRUCTORS – OTHER



Supports the development of new innovative strategies and enhance existing strategies to recruit and retain CTE instructors.

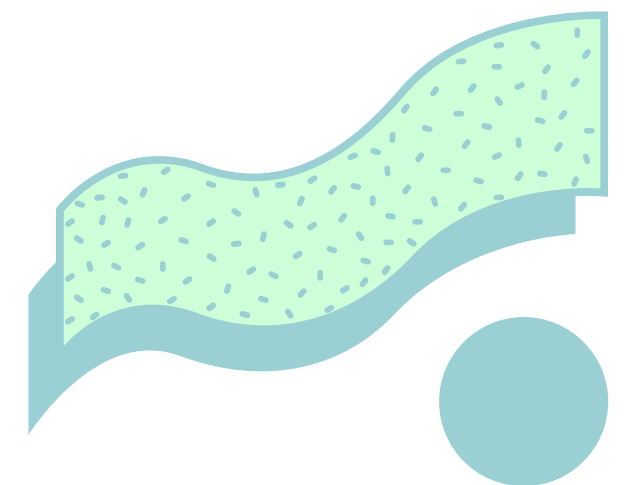
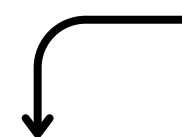


Examples: Professional Development (conference registration, mileage, airfare, lodging), Flippen Group Training, Clifton Strength Finder Codes

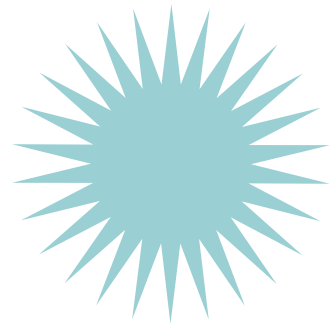


Up to \$20,000 for year one and up to \$20,000 for year two

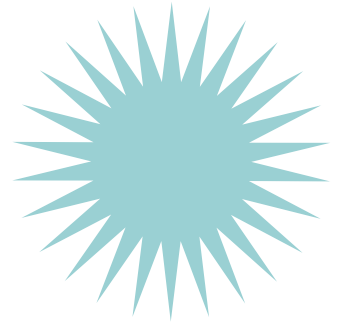
New for FY25!



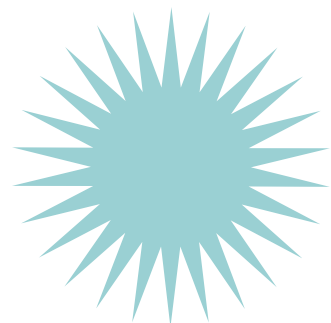
# IMPROVING ACADEMIC PROFICIENCY



Designed to increase academic outcomes in English Language Arts, Science, and/or Mathematics



Funds can be utilized to implement strategies during or after school hours

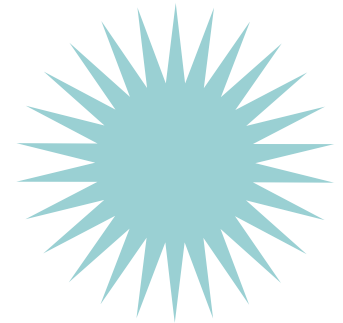


Up to \$25,000 for year one and up to \$25,000 for year two

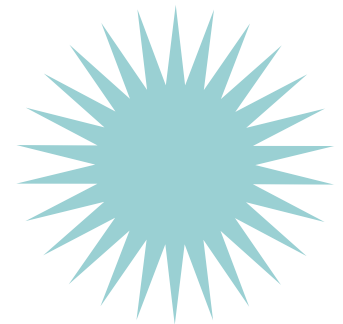




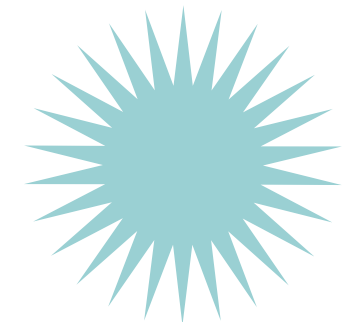
# CTE NEW PROGRAM



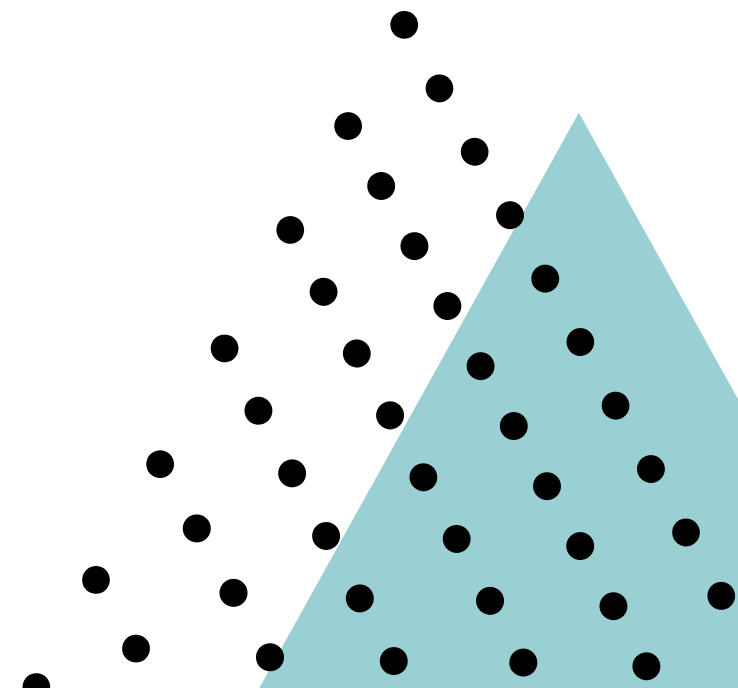
The purpose of this grant is to provide startup funding for new CTE programs



Includes any program approved within the past three years. Applicants can only receive one grant within the three year period

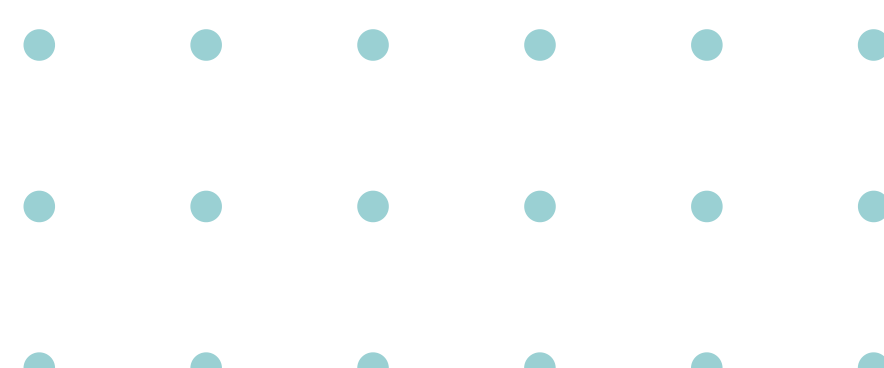


Up to \$25,000 - one year grant





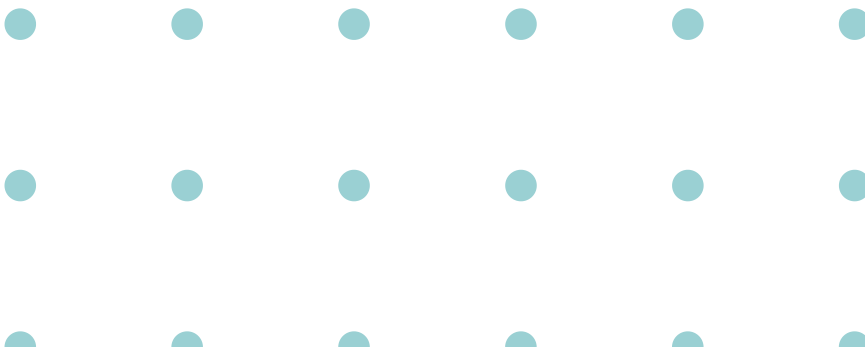
# ELIGIBILITY REQUIREMENTS

- Secondary schools must meet the \$15,000 allocation requirement
  - Technology Centers and Post-Secondary institutions must meet the \$50,000 allocation requirement
  - Consortiums must write grant application to include all schools
  - Successful completion of the Comprehensive Local Needs Assessment (CLNA) - must align with priorities
  - Submitted and approved Form 2 if applicable
- 

# HOW TO APPLY

The screenshot shows the 'FLA Grant Submit Worksheet - Step 1' form within the Oklahoma CareerTech CTIMS system. The interface includes a top navigation bar with the logo and 'FLA - Local Initiative Coordinator' user information. A left sidebar contains a navigation menu with 'Grants', 'Grant Process', and 'FLA Process' expanded to show 'FLA New Worksheet / Agreement Flow' and 'FLA Manage Grant WorkShee'. The main form area is titled 'FLA Grant Submit Worksheet - Step 1' and contains two sections of input fields. The first section includes dropdowns for 'Fiscal Calendar Year' (2021-2022), 'Organization Type' (K-12 Schools), and 'Organization District', along with a 'Worksheet No.' text field. The second section, titled 'Client Basic Information For work Sheet', includes dropdowns for 'Organization Type' (Business Masters), 'Organization', 'Grant Fund Type' (FLA), 'Organization' (with a placeholder), and 'Program Initiative' (--Select--). The 'Client Type' dropdown is set to 'Business Masters ( Company)' and there is a 'Business Code' text field. 'Save & Next' buttons are located at the top right and bottom right of the form area.

FLA Grant Submit Worksheet - Step 1	
Fiscal Calendar Year*	2021-2022
Organization Type*	K-12 Schools
Organization District*	
Worksheet No.*	
Grant Fund Type*	FLA
Organization*	Enter the first three characters of any word that is included in your org...
Program Initiative*	--Select--
Client Basic Information For work Sheet	
Organization Type*	Business Masters
Organization*	
Client Type*	Business Masters ( Company)
Business Code*	



# Invoicing Process & OCAS Codes

Denise Bethke

# APPROVAL PROCESS

FLA - Local Finance Coordinator



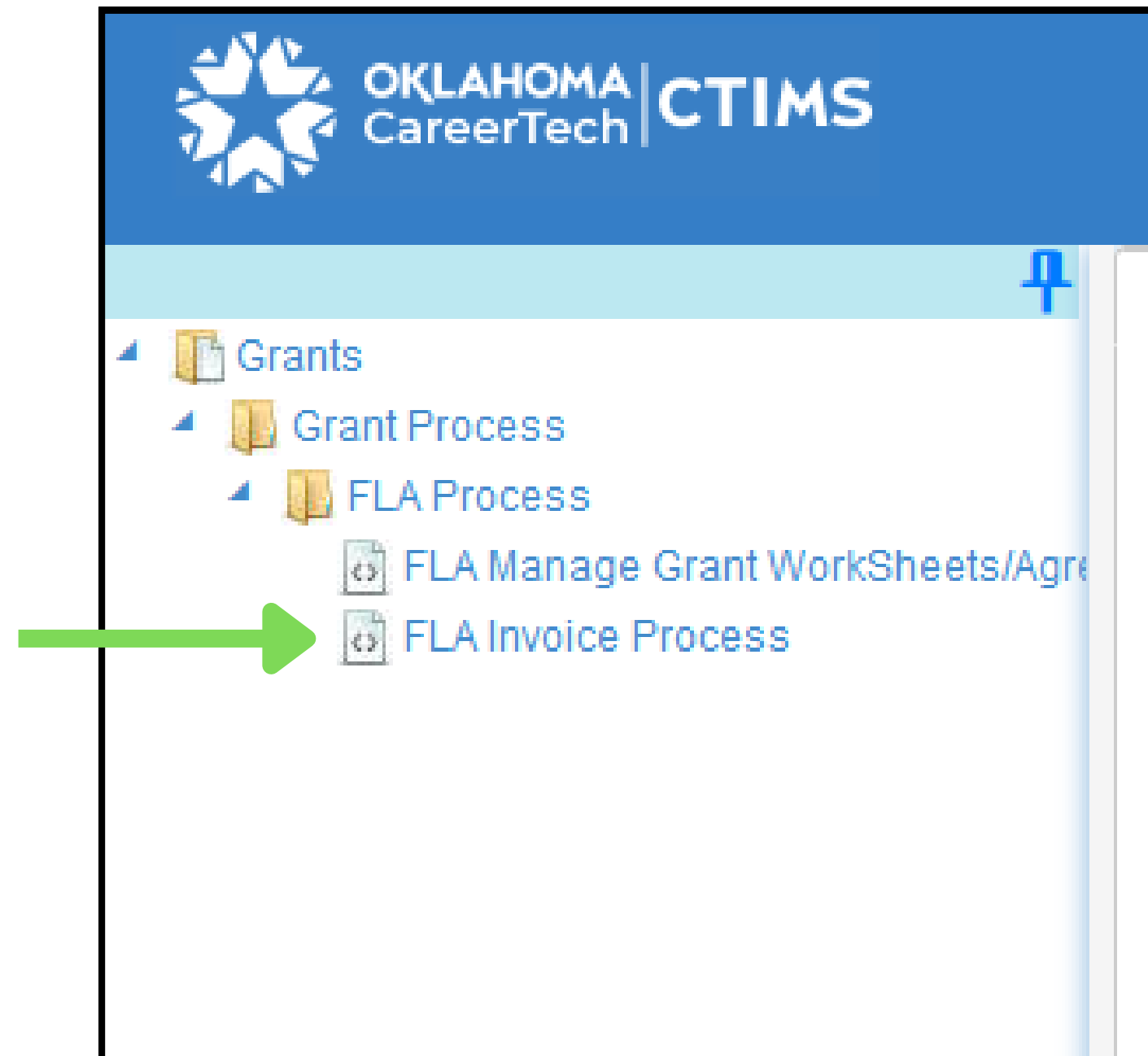
ODCTE Finance Document Coordinator



ODCTE Finance Reviewer



# INVOICE PROCESS



# INVOICE PROCESS

TIMS

FLA - Local Finance Coordinator

Dashboard | FLA Invoice Process

## FLA Grant Fund Invoices List

Fiscal Calendar Year: \* 2023-2024

Grant Fund Type: \* FLA

Organization Type: \* College District

Organization: \* Enter the first three characters of any word ...

Organization District: \*

Program Initiative: \* --Select--

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

Approval Function Type: \* All

Filter on Status: \* All

Search

Export to Excel

New Invoice

Provider Name

Client Name

Agreement

BAP Process Agreement

# INVOICE PROCESS

The screenshot shows a web application interface for the 'FLA Invoice Process'. The main heading is 'FLA Grant Fund Invoices List'. There are several filter fields: 'Fiscal Calendar Year' (2023-2024), 'Organization Type' (K-12 Districts), 'Organization District' (School System), 'Grant Fund Type' (FLA), 'Organization' (School System), and 'Program Initiative' (Carl Perkins High School Secondary Local Application - 421). Below these are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'. There are also filter fields for 'Approval Function Type' (All) and 'Filter on Status' (All), along with a 'Search' button. An 'Export to Excel' button is visible. A table with columns for 'New Invoice', 'Provider Name', 'Client Name', 'Agreement', 'BAP Process', 'Agreement Submission Date', and 'Agreement Approval Stage' is shown. The first row of data is highlighted, and a red circle highlights the 'New Invoice' link in the first column of that row.

New Invoice	Provider Name	Client Name	Agreement	BAP Process	Agreement Submission Date	Agreement Approval Stage
<a href="#">New Invoice</a>	Leonard School System	LEONARD SCHOOL SYSTEM	WSAG-2324-FLA-FLA-CPHSS-421-551012050-F2203...	No	09/08/2023 13:12:25	State Supervisor - Fully ...

# INVOICE PROCESS

Dashboard FLA Invoice Process X New Invoice X

### FLA Grant Submit Invoice - Step 1

**Provider Organization Details**

Fiscal Calendar Year:*	2023-2024	Grant Fund Type:*	FLA
Organization Type:*	K-12 Districts	Organization:*	School System
Organization District:*	..... School System	Program Initiative:*	Carl Perkins High School Secondary Local Application - 421
Worksheet No:*	WS-2324-FLA-FLA-CPHSS-421-55I012050-AA3FBBE857AD		
Agreement No:*	WSAG-2324-FLA-FLA-CPHSS-421-55I012050-F2203CC2F58E		
Invoice No:*	INV-2324-FLA-FLA-CPHSS-421-55I012050-F185BEE5A8CA		

Basic Client Information

Project Details

Refresh Save & Next

# INVOICE PROCESS

FLA Grant Submit Invoice - Step 2

Provider Organization Details Refresh Invoice S

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approv Total
<input checked="" type="checkbox"/>	STEM GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$45,623.00	Cost Per Each	\$45,623.00	\$45,623.00
<input checked="" type="checkbox"/>	STEM GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$46,073.00	Cost Per Each	\$46,073.00	\$46,073.00
<input checked="" type="checkbox"/>	STEM GTT Teacher Benefits - 100%...	1000-200-330	1000-Personnel Services - Employee Benefits-200-...	1.00	\$15,511.82	Cost Per Each	\$15,511.82	\$15,511.82
<input checked="" type="checkbox"/>	STEM GTT Teacher Benefits - 100%...	1000-200-330	1000-Personnel Services - Employee Benefits-200-...	1.00	\$15,664.82	Cost Per Each	\$15,664.82	\$15,664.82
<input checked="" type="checkbox"/>	AgEd Flex Salary - 100% J....., E.....	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	2.00	\$4,500.00	Cost Per Each	\$9,000.00	\$9,000.00
<input checked="" type="checkbox"/>	AgEd Flex Benefits - 100% J....., E.....	1000-200-330	1000-Personnel Services - Employee Benefits-200-...	2.00	\$1,530.00	Cost Per Each	\$3,060.00	\$3,060.00
<input type="checkbox"/>	Guid. Dell Laptops, prosupport, Offi...	2120-600-330	2120-Supplies-600-Supplies-330-Guidance Services	3.00	\$1,032.56	Cost Per Each	\$3,097.68	\$3,097.68
<input type="checkbox"/>	FACS Fasion Design BDL APPARE...	1000-600-330	1000-Supplies-600-Supplies-330-Instruction	2.00	\$4,212.53	Cost Per Each	\$8,425.06	\$8,425.06

# INVOICE PROCESS

Grant Allocation

Invoice Line Items

<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total
<input type="checkbox"/>	STEM/GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$45,623.00	Cost Per Each	\$45,623.00
<input type="checkbox"/>	STEM/GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$46,073.00	Cost Per Each	\$46,073.00
<input checked="" type="checkbox"/>	STEM/GTT Teacher Benefits - 100% - ... (34%)	1000-200-330	1000-Personnel Services - Employee Benefits-200-...	1.00	\$15,511.82	Cost Per Each	\$15,511.82

+ Add Invoice

	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Total
<input type="checkbox"/> Edit	Active	STEM/GTT Teacher Benefits - ...	1000-200-330	1.00	\$14,220.22	Cost Per Each	\$14,220.22

# INVOICE PROCESS

Invoice Line Items											
<input type="checkbox"/>	Agreement Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Avl. to Invoice	Current Line Invoiced	Total Invo
<input type="checkbox"/>	STEM/GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$45,623.00	Cost Per Each	\$45,623.00	\$45,623.00	\$41,816.07	\$0.00	\$3,80
<input type="checkbox"/>	STEM/GTT Teacher Salary - 100% - ...	1000-100-330	1000-Personnel Services - Salaries-100-Personnel...	1.00	\$46,073.00	Cost Per Each	\$46,073.00	\$46,073.00	\$42,224.96	\$0.00	\$3,84
<input checked="" type="checkbox"/>	STEM/GTT Teacher Benefits - 100% - ...	1000-200-330	1000-Personnel Services - Employee Benefits-200-...	1.00	\$15,511.82	Cost Per Each	\$15,511.82	\$15,511.82	\$14,220.22	\$0.00	\$1,29

<input type="checkbox"/>	Is Active	Invoice Line Desc.	Budget Line(OCAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Total	Total To Be Invoiced	Date Of Expense
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STEM/GTT Teacher Benefits...	1000-200-330	1.00	14,220.22	Cost Per Each	14220.22	14220.22	

# INVOICE PROCESS

Avl. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet
\$41,816.07	\$0.00	\$3,800.93	STEM/GTT T
\$42,224.96	\$0.00	\$3,848.04	STEM/GTT T
\$14,220.22	\$0.00	\$1,291.60	STEM/GTT T
\$14,365.41	\$0.00	\$1,299.41	STEM/GTT T
\$8,100.00	\$0.00	\$900.00	AgEd Flex S
\$2,755.26	\$0.00	\$304.74	AgEd Flex B
\$3,619.98	\$0.00	\$0.00	Guid: ASUS
\$8,425.06	\$0.00	\$0.00	FACS Fasio
\$9,076.00	\$0.00	\$0.00	FACS ProSt
\$1,279.00	\$0.00	\$0.00	FACS Proof
\$1,594.30	\$0.00	\$0.00	STEM 10 Fi
\$30,000.00	\$0.00	\$0.00	AgEd: Forkl
\$350.00	\$0.00	\$0.00	AgEd: Forkl
<b>\$198,921.34</b>	<b>\$0.00</b>	<b>\$11,789.66</b>	



# INVOICE PROCESS

FLA Grant Submit Invoice - Step 2

	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Avl
100-Personnel S	1.00	\$45,623.00	Cost Per Each	\$45,623.00	\$45,623.00	

# INVOICE PROCESS

Project Details

Grant Allocation

Invoice Line Items

**Attachments**

Browse:

Attachment Note:

Active/Inactive file(s)  Delete file(s)

# INVOICE PROCESS

Attachments

**Acknowledgements**

By checking this box, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812 2 CFR 200.415(a) (CFR 2015 ed.)

\*  I have attached signed federal detail and summary accounting reports that show proof of payments (OCAS reports for secondary recipients, OCAS or other accounting reports for Technology Centers and colleges. Financial Analysis reports are NOT adequate for payment and will cause the invoice to be rejected)

I have attached LEGIBLE copies of all required vendor invoices if applicable.

Reporting Period: Date Range: (MM/DD/YY To MM/DD/YY) \*

Check box if final request for reimbursement:






Acknowledgement Note:

**B** **I** **U** (inherited size) (inherited font) Format

Refresh Invoice Summary One Step Back Save as Draft **Submit for Approval**

# INVOICE PROCESS

FLA Grant Submit Invoice - Step 2

 Refresh  Invoice Summary  One Step Back  Save as Draft  Submit for Approval ▼

▼

▼

▼

▲

**Invoice Individual Summary**

Report Generation Date: 1/10/2024 4:17:03 PM

**INV-2324-FLA-FLA-CPHSS-421-55I012050-8C891A8A74A9 - 74A9**

**Carl Perkins High School Secondary Local Application - 421**

School Name: **School System**

Business Name: **SCHOOL SYSTEM**

Vendor Number: 77000

IDC Rate: 2.59%

Date of Request Submitted: **10/31/2023 4:52 PM**

First Submitted By: [REDACTED]

Last Submitted On: **10/31/2023 4:52 PM**

Last Submitted By: [REDACTED]

Fully Approved Date :

Fully Approved By:

Fully Approver Role:

Budget Line Description	Function Code	Object Code	Program Code	Request Item Total
STEM/GTT Teacher Salary - 100%	1000 - Instruction	100 - Personnel Services - Salaries	330 - Carl Perkins - Academic Integration	\$3,848.04
AgEd Flex Salary - 100%	1000 - Instruction	100 - Personnel Services - Salaries	330 - Carl Perkins - Academic Integration	\$900.00
STEM/GTT Teacher Salary - 100%	1000 - Instruction	100 - Personnel Services - Salaries	330 - Carl Perkins - Academic Integration	\$3,806.93
AgEd Flex Benefits - 100% (34%)	1000 - Instruction	200 - Personnel Services - Employee Benefits	330 - Carl Perkins - Academic Integration	\$304.74
STEM/GTT Teacher Benefits - 100% (34%)	1000 - Instruction	200 - Personnel Services - Employee Benefits	330 - Carl Perkins - Academic Integration	\$1,291.60
STEM/GTT Teacher Benefits - 100% (34%)	1000 - Instruction	200 - Personnel Services - Employee Benefits	330 - Carl Perkins - Academic Integration	\$1,299.41
Indirect Costs (2.96%)	5400 - Indirect Cost Federal Entitlement Programs	900 - Other Uses of Funds	330 - Carl Perkins - Academic Integration	\$338.94
<b>Total Invoiced</b>				<b>\$11,789.66</b>

**Compliance Acknowledgements:**

Acknowledgement	Answer	Submitted By	Submitted On
By checking this box, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812 2 CFR 200.415(a) (CFR 2015 ed.)	Yes	-	10/31/2023 4:52:34 PM
I have attached signed federal detail and summary accounting reports that show proof of payments (OCAS reports for secondary recipients, OCAS or other accounting reports for Technology Centers and colleges. Financial Analysis reports are NOT adequate for payment and will cause the invoice to be rejected)	Yes		
I have attached LEGIBLE copies of all required vendor invoices if applicable.	Yes		
Reporting Period: Date Range: (MM/DD/YY To MM/DD/YY)		07/01/2023 to 09/30/2023	
Check box if final request for reimbursement:	No		

# INVOICE PROCESS

Dashboard FLA Invoice Process X New Invoice X Invoice Summary X

1 of 1 Find | Next PDF

School System-9F30: 1 of 1 Page 1 of 1

## Invoice Individual Summary

Report Generation Date: 1/10/2024 2:02:00 PM

INV-2324-FLA-FLA-CPHSS-421-551012050-80275B889E30-9E

# REJECTED INVOICE

The screenshot shows the 'FLA Grant Fund Invoices List' application. The top navigation bar includes 'Dashboard' and 'FLA Invoice Process'. The sidebar on the left contains 'Grant Process', 'FLA Process', 'FLA Manage Grant W', and 'FLA Invoice Process'. The main content area features a title bar 'FLA Grant Fund Invoices List' and several filter fields: 'Fiscal Calendar Year:\* 2023-2024', 'Organization Type:\* K-12 Districts', 'Organization District:\* School System', 'Grant Fund Type:\* FLA', 'Organization:\* School System', and 'Program Initiative:\* Carl Perkins High School Secondary Local Application - 421'. Below these are tabs for 'Grant Worksheet/Agreement/Invoice List' and 'Manage Grant Invoices'. Further down are 'Approval Function Type:\* All' and 'Filter on Status:\* All' with a search button. An 'Export to Excel' button is also present. The data table has columns: 'New Invoice', 'Provider Name', 'Client Name', 'Agreement', 'BAP Process', 'Agreement Submission Date', and 'Agreement Approval Stage'. The first row of data is: 'New Invoice', 'L... School System', 'L... SCHOOL SYSTEM', 'WSAG-2324-FLA-FLA-CPHSS-421-551012050-F2203...', 'No', '09/08/2023 13:12:25', and 'State Supervisor - Fully ...'. A red circle highlights the 'New Invoice' button in the table header.

New Invoice	Provider Name	Client Name	Agreement	BAP Process	Agreement Submission Date	Agreement Approval Stage
New Invoice	L... School System	L... SCHOOL SYSTEM	WSAG-2324-FLA-FLA-CPHSS-421-551012050-F2203...	No	09/08/2023 13:12:25	State Supervisor - Fully ...

# REJECTED INVOICE

Export to Excel

New Invoice	Provider Name	Client Name	Agreement	BAP Process	Agreement Submission
			WSAG-2324-FLA-FLA-CPPS-422-35A020050-B37D...	Yes	09/13/2023 08:52:51

Invoice Summary

Save changes  Cancel changes  Export to Excel

	Active/Inactive	Current Approval Stage	BAP Process	Provider Name	Approval Status	Invoice
▶	<input checked="" type="checkbox"/>	Local Finance Coordinator - 1st Stage	Yes		Reject	INV-2324-FLA-FLA-C
▶	<input checked="" type="checkbox"/>	Local Finance Coordinator - 1st Stage	Yes		Reject	INV-2324-FLA-FLA-C

◀ ◁ 1 ▷ ▶



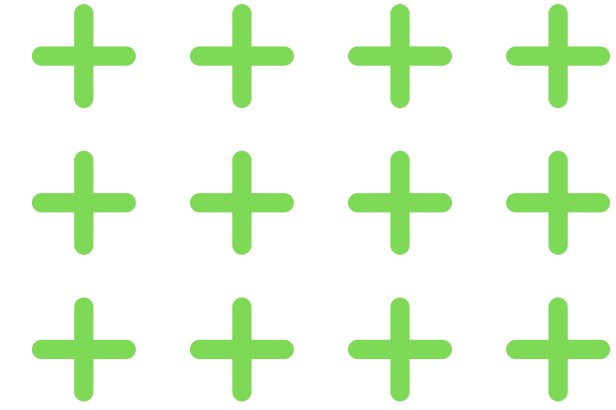
# REJECTED INVOICE

<input type="checkbox"/>	Off-contract training, PLTW Trainin...	1000-300-330	1000-Purchased Professional and Technical Services...	2.00	\$1,200.00	Cost Per Each	\$2,400.00	\$2,400.00
<input type="checkbox"/>	Stipends for off contract training	2200-100-330	2200-Personnel Services - Salaries-100-Personnel S...	28.00	\$128.00	Cost Per Each	\$3,584.00	\$3,584.00
<input checked="" type="checkbox"/>	Indirect Costs (2.96%)	5400-900-330	5400-Other Uses of Funds-900-Other Uses of Funds-...	1.00	\$5,233.80	Cost Per Each	\$5,233.80	\$5,233.80
<input type="checkbox"/>	Shipping & handling	1000-600-330	1000-Supplies-600-Supplies-330-Instruction	1.00	\$511.19	Cost Per Each	\$511.19	\$511.19
<input type="checkbox"/>	Adjustable chairs for FACS classro...	1000-600-330	1000-Supplies-600-Supplies-330-Instruction	24.00	\$189.16	Cost Per Each	\$4,539.84	\$4,539.84
							<b>\$210,711.00</b>	<b>\$210,711.00</b>

Attachments ▼

Acknowledgements ▼

[Refresh](#) [Invoice Summary](#) [One Step Back](#) [Save as Draft](#) [Submit for Approval](#) **[Change Request](#)** [Approval Process](#)

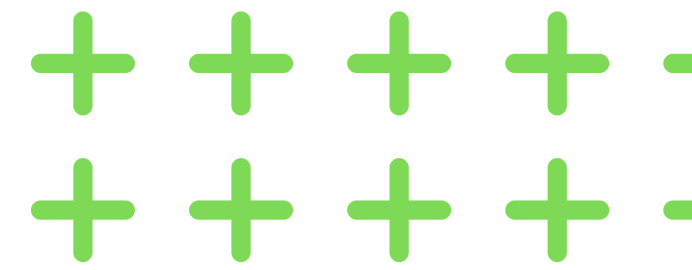


# IDC VS ADMIN

Budgeted Admin can be claimed up to 5% and is only based on expenditures to date

Check totals using Admin/IDC worksheet located on website





# RESOURCES

Assistance > Perkins > Grant Application Information > Resources

## Grant Application Resources

### Perkins Application Resources

- [Indirect Cost Calculation Worksheet](#)
- [Perkins Allowable and Non-Allowable Expenditures](#)
- [Assurance of Compliance](#)
- [Certifications Regarding Lobbying & Debarment](#)
- [Frequently Used OCAS Codes](#)



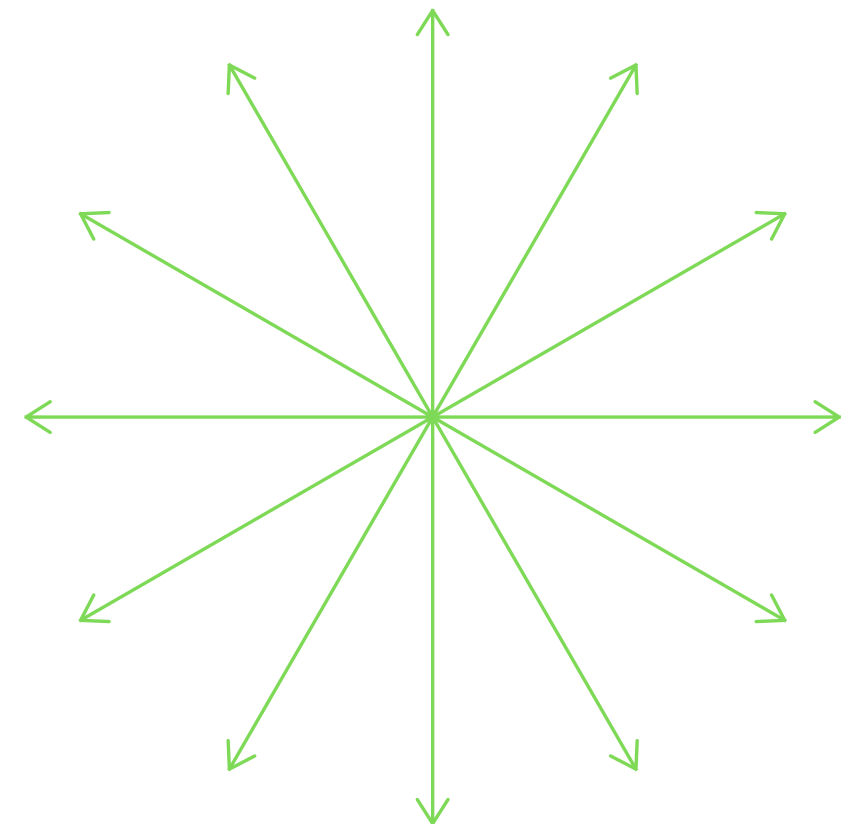
# SUPPORTING DOCUMENTATION

When submitting an invoice, the following documentation is required:

- All pages of vendor invoice
- Expenditure Report
- Copy of Registration

Crossing Fiscal Years

Consortiums





# BUDGET GUIDELINES

Travel for Basic Grants

- 421, 422 & 423 Worksheets
- Mileage & Airfare allowed to & from conference
- Conference Registration



# BUDGET GUIDELINES

Travel for Innovative Grants

- Includes 424, 426, 429 & 479 Worksheets
- Registration, Mileage, Airfare, Lodging, Per Diem per GSA website
- Flat Rate Per Diem
- Admin vs Non. Admin

# ITEMIZED BUDGET

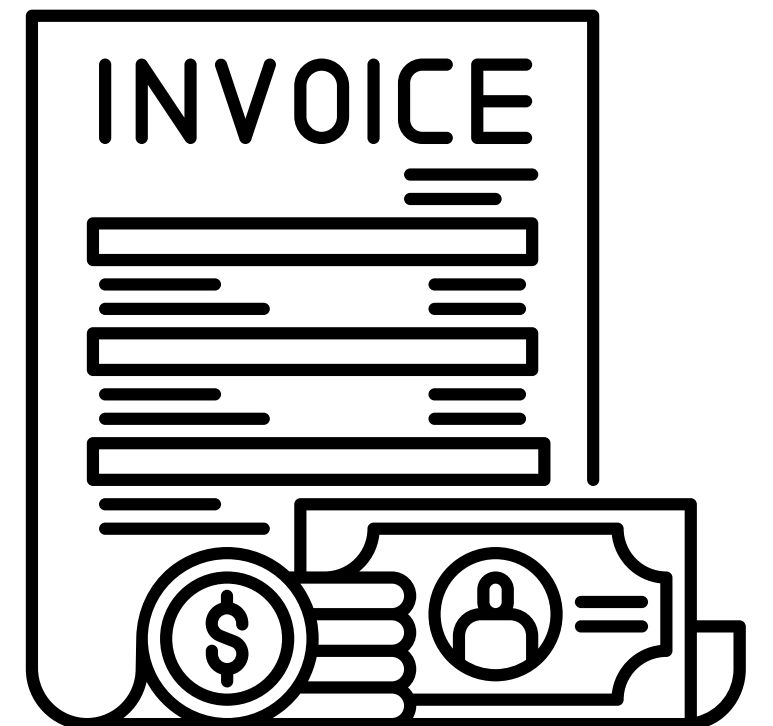
Budget Line Description	Req. Units	Req. Unit Cost	Req. Unit Type	Line Item Total
STEM: Safety Goggles	32	\$ 4.77	Each	\$ 152.64
STEM: Safety Goggles 32 at \$4.77	1	\$ 152.64	Each	\$ 152.64



# HELPFUL TIPS

Before submitting an invoice in CTIMS confirm the following:

- Function & Object codes
- Totals and reporting period dates match both OCAS Expenditure Report and CTIMS Invoice Summary





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If claiming less in CTIMS than amount shown on uploaded OCAS expenditure report, indicate this reduction on both OCAS expenditure report and vendor invoice.



Example: Item purchased is \$100 but you're only claiming \$80



# HELPFUL TIPS

For Amazon purchases, provide either the invoice from your business account or go into orders, select the items purchased and print invoice.

Cut and paste portions of your statement are not accepted

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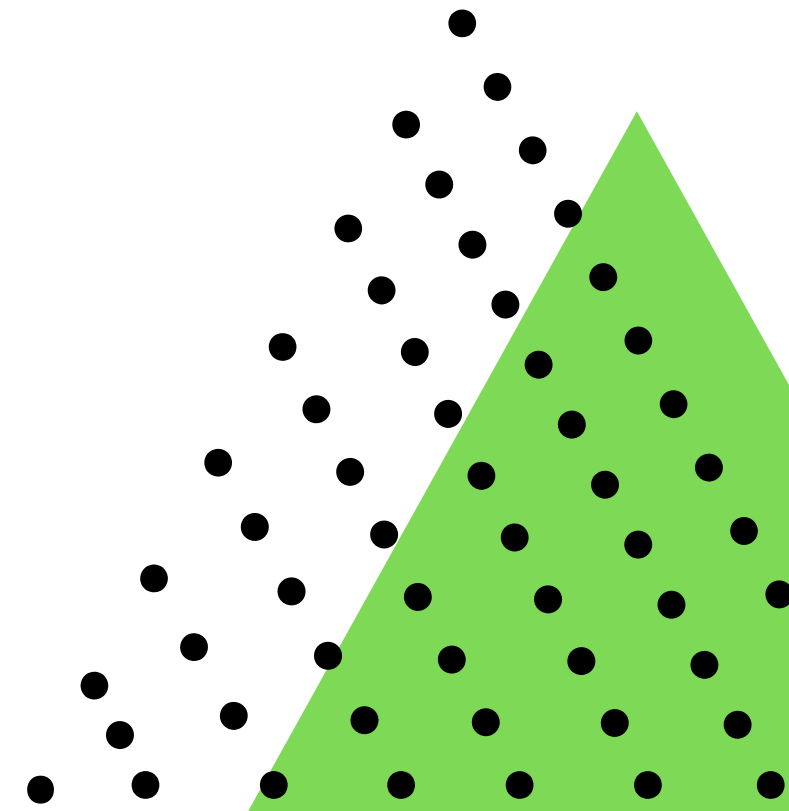
Utilize the Compliance Acknowledgement box to indicate if you're submitting your final claim

Expenditures must match the budget line description approved on your agreement

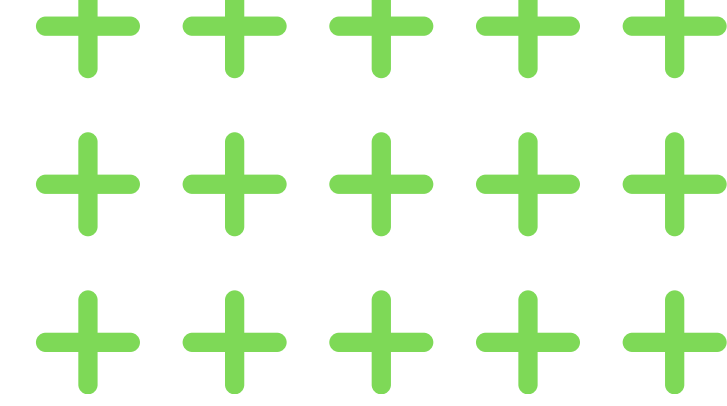




**QUESTIONS?**



# Contact Us



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