

Perkins V

Template Instructions

January 13, 2021

10:00-10:30



Sequence of steps to file a claim

1. Complete [Template 1](#) (Original 2019-2021) and [Template 2](#) (New for 2021)
2. Create a new claim in Iowa Grants
3. Upload the template into Iowa Grants
 - a. *Do not upload invoices, receipts, or general ledgers
4. Submit the claim for reimbursement
5. File summary template with invoices and receipts
 - a. Invoices and receipts available upon request for state and federal monitoring.
 - b. *Claims for CTSO reimbursement must include invoices, receipts & general ledgers

Sec. 135 Local Use of Funds

Perkins Purchase Summary by Quarter				
Perkins V Activities	Perkins V Authority and Extended Description	Budget Code	Expenditure, Item Description, or Activity	Amount this claim
Perkins V Activity 1	(1) provide career exploration and career development activities through an organized, systematic framework designed to aid students, including in the middle grades, before enrolling and while participating in a career and technical education program, in making informed plans and decisions about future education and career opportunities and programs of study, which may include—	Equipment Software 735	Career Information System	\$ 12,000.00
Perkins V Activity 2	(2) provide professional development for teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals, which may include—	Staff Travel 580	IACTE Virtual Conference Registration	\$ 200.00
Perkins V Activity 3	(3) provide within career and technical education the skills necessary to pursue careers in high-skill, high-wage, or in-demand industry sectors or occupations;	Purchased Services 3xx	Virtual Fiber Optic Training - Electrification Union	\$ 400.00
Perkins V Activity 4	(4) support integration of academic skills into career and technical education programs and programs of study to support—	Purchased Services 3xx	Math in CTE Training	\$ 1,500.00



Salaries and Substitute Pay

Permanent Staff Salaries and Benefits Summary

Staff salaries this quarter

Staff Name	Job Title	Salary+FICA+ IPERS
Jane Smith	CTE Career Counselor	\$10,000.00
Matt Black	WBL Coordinator	\$2,500.00
Total		\$12,500.00

Substitute Salaries and Benefits Summary

Substitute Name	Event Covered	Salary+FICA+ IPERS
Sam Thompson	IACTE	\$120.00
Russell Armstrong	WBL Conference	\$125.00
Total		\$245.00
General Ledger on File		
Time and Effort Documentation on File		
Job Descriptions on File		

In-State travel										
Date	Location	Attendee Last Name	Registraton Fee	Mileage	Hotel	Sub-Total				
						\$ -				
						\$ -				
						\$ -				
							Total	\$ -		
*May use institutional per diem										
Out-Of-State travel										
Date	Location	Attendee	Registraton Fee	Mileage	Airfare	Baggage	Transport Uber Shuttle	Hotel	Meals Per Diem @	Sub-Total
										\$ -
										\$ -
										\$ -
										\$ -
								Total		\$ -
*May use institutional per diem										

Sec. 135 Assurances 1/3

<p>The undersigned certifies the district, or members of the consortium, will abide by the assurances listed below during the period of the grant award. The undersigned also certifies that, to the best of their knowledge, the information contained in this application is correct and complete.</p>			
<p>Required Policies and Procedures will be updated over a three year cycle to prepare for future federal audits and monitoring</p>			
<p>Instructions</p>			
<p>Indicate Yes, Correct, or No to each of the certifications and/or assurances below related to claim submission.</p>	<p>Yes/Correct</p>	<p>No</p>	<p>Not Applicable</p>
<p>Claims will be submitted:</p>			
<p>The fiscal year 2021 claims will be submitted quarterly on January 15, and April 15.</p>			
<p>The fiscal year 2021 final claim will be submitted on or before July 15, 2021.</p>			
<p>Invoices and receipts will be kept on file, and available upon request (by state or federal agencies) for every purchase.</p>			
<p>Purchases intended for student use in the fall semester will be ordered in a timely manner for use in the fall.</p>			
<p>Purchases intended for student use in the spring semester will be ordered in a timely manner for student use in the spring.</p>			
<p>Job descriptions and time and effort sheets are on file.</p>			
<p>All claims will be made available for review to the CTE Bureau during the monitoring cycle.</p>			

Sec. 135 Assurances 2/3

The undersigned certifies the district, or members of the consortium, will abide by the assurances listed below during the period of the grant award. The undersigned also certifies that, to the best of their knowledge, the information contained in this application is correct and complete.

Required Policies and Procedures will be updated over a three year cycle to prepare for future federal audits and monitoring

Instructions			
Indicate Yes, Correct, or No to each of the certifications and/or assurances below related to claim submission.	Yes/Correct	No	Not Applicable
Individual student or instructor memberships are unallowable and have not been included in the claim for reimbursement.			
Extra duty pay does not supplant the district fund.			
Basic district fund purchases are not supplanted using Perkins funding including, lockers, storage, brooms, dustpans, capital expenditures, wiring, whiteboards, furniture etc. (see Allowable Use of Fund document in the Instructions link above)			
Secondary inventory purchases at a threshold of a \$500 per unit cost will be inventoried and labeled as a Perkins purchase. Inventory Template			
Postsecondary purchases at a threshold of a \$5,000 per unit cost will be inventoried and labeled as a Perkins purchase.			
Inventory forms are available to state or federal auditors upon request.			
Marketable credentials (College credit, graduate credit, CE Units, CASE or PLTW endorsements or certifications, MOC, ProStarttrain-the-trainer courses, etc.) are not reimbursed to Perkins instructors, staff, or advisors with Perkins federal funding.			

Sec. 135 Assurances 3/3

<p>The undersigned certifies the district, or members of the consortium, will abide by the assurances listed below during the period of the grant award. The undersigned also certifies that, to the best of their knowledge, the information contained in this application is correct and complete.</p>			
<p>Required Policies and Procedures will be updated over a three year cycle to prepare for future federal audits and monitoring</p>			
<p style="text-align: center;"><u>Instructions</u></p>			
<p>Indicate Yes, Correct, or No to each of the certifications and/or assurances below related to claim submission.</p>	<p>Yes/Correct</p>	<p>No</p>	<p>Not Applicable</p>
<p>Food, furniture, transportation, consumables, storage, capital expenditures, promotional materials, student travel, student and instructor individual membership dues, any items that supplant the district fund are not reimbursed using Perkins federal funding.</p>			
<p>Instructors are appropriately licensed, certified, or endorsed for the CTE and related (PLTW, CASE etc) courses taught.</p>			
<p>Purchases are for specific programs or programs of study outlined in the comprehensive local needs assessment (CLNA) and Perkins application.</p>			
<p>Budget amendment requests-rationale is documented in IG annotations.</p>			
<p>Requests not included in original CLNA have been vetted with and approved by consultant and noted in annotations by recipient and consultant prior to approval and reimbursement.</p>			

Perkins Claims

Please note that either summary template one or template two is appropriate for use.

[1 - Template Instructions](#)

[Summary Template 1 - District Cons & CC](#)

[Summary Template 2 - District Cons & CC](#)

[Allowable and Unallowable Costs](#)

[Memo on CTSO Memberships](#)

[2 - Iowa Grants Claim Instructions](#)

[3- Embed a CTSO](#)

[4 - Budget Amendment](#)

[Perkins FAQ & Perkins Federally Required Policies and Procedures](#)

Amy Vybiral M.S. Ed.
Consultant
amy.vybiral@iowa.gov
515-339-4520
Bureau of Career and Technical Education
Iowa Department of Education



Iowa Department of Education
Grimes State Office Building
400 E 14th St
Des Moines, IA 50319-0146

