2026–2027

Perkins Handbook

NC COMMUNITY COLLEGES

CREATING SUCCESS

April 2026

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Introduction

The Perkins Handbook provides the main and trusted source of policies, guidance, and procedures for the implementation of The Strengthening Career and Technical Education for the 21st Century Act of 2018 (known as Perkins V) for the colleges in the North Carolina College System (NCCCS) eligible to receive Perkins funding. The full text of The Carl D. Perkins Career and Technical Education Act of 2006 as amended by The Strengthening Career and Technical Education for the 21st Century Act of 2018 is available on the GovInfo website.

The contents of this handbook were made possible through Perkins V from the United States Department of Education (ED) administered through the NCCCS Federal Programs unit. Additional resources and guidance cited in this handbook were obtained from the United States Education Department General Administrative Regulations (EDGAR) 2 CFR 200, Uniform Administrative Requirements, Cost Principles, Audit Requirements for federal awards, and the current North Carolina State Perkins Plan. Content does not necessarily represent ED policy or EDGAR.

Publication Change History

The handbook may be modified throughout the programs year with updates being highlighted and announced on the NCCCS website.

Version	Publication Date	Authors	Section(s) Revised
1.0	April 2026	NCCCS	Original
2.0	October 2026	NCCCS	Updated CTSO permissible costs, equipment threshold, lost or stolen equipment, and program income.

This document and all subsequent revisions are the property of the North Carolina Community College System and can be used or copied only in accordance with the North Carolina Community College System Office policies in effect.

All revisions will be *highlighted.*

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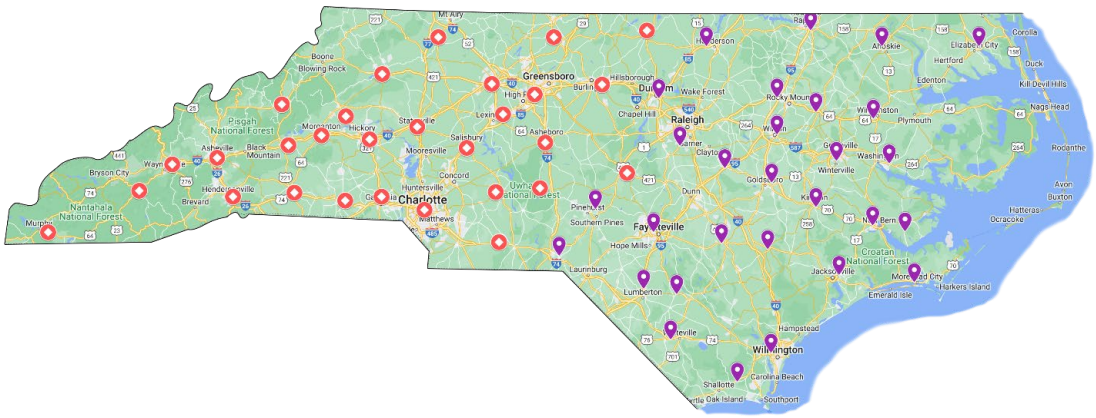
The Assistant Directors for Perkins Regional Services are designated to specific regions, serving as the primary liaison for inquiries and support related to the Perkins Basic Grant for their assigned institutions as noted below.

Patti Coultas, East

Beaufort County Community College
Bladen Community College
Brunswick Community College
Cape Fear Community College
Carteret Community College
Coastal Carolina Community College
College of The Albemarle
Craven Community College
Durham Technical Community College
Edgecombe Community College
Fayetteville Technical Community College
Halifax Community College
James Sprunt Community College
Johnston Community College
Lenoir Community College
Martin Community College
Nash Community College
Pamlico Community College
Pitt Community College
Richmond Community College
Roanoke-Chowan Community College
Robeson Community College
Sampson Community College
Sandhills Community College
Southeastern Community College
Vance-Granville Community College
Wake Technical Community College
Wayne Community College
Wilson Community College

Stefanie Schroeder, West

Alamance Community College
Asheville-Buncombe Technical Community College
Blue Ridge Community College
Caldwell Community College and Tech. Institute
Catawba Valley Community College
Central Carolina Community College
Central Piedmont Community College
Cleveland Community College
Davidson-Davie Community College
Forsyth Technical Community College
Gaston College
Guilford Technical Community College
Haywood Community College
Isothermal Community College
Mayland Community College
McDowell Technical Community College
Mitchell Community College
Montgomery Community College
Piedmont Community College
Randolph Community College
Rockingham Community College
Rowan-Cabarrus Community College
South Piedmont Community College
Southwestern Community College
Stanly Community College
Surry Community College
Tri-County Community College
Western Piedmont Community College
Wilkes Community College



2026–2027 Timeline

Quarterly Perkins Webinars

The Perkins team hosts mandatory Quarterly Perkins Technical Assistance Webinars. These sessions will be virtual, and recordings will be available on the 2026–2027 NCPerkins Grant Management System.

Date	Time
September 8, 2026	9:00–10:30 a.m.
November 10, 2026	9:00–10:30 a.m.
March 9, 2027	9:00–10:30 a.m.
May 11, 2027	9:00–10:30 a.m.

Important Deadlines

MAY 29, 2026

- ☐ Submit all five essential Perkins Management Team contacts at your college for the 2026–2027 year.
- ☐ Submit signed Allotment Acceptance and Statement of Assurances.
- ☐ Submit Local Plan and Budget.
- ☐ Upload job descriptions for any position funded fully or partially by Perkins V funds.

OCTOBER 14–16, 2026

- ☐ Attend the Fall Perkins Meeting as Presession in Raleigh (October 14).
- ☐ Attend the NCCCS System Conference in Raleigh (October 14–16).

NOVEMBER 20, 2026

- ☐ Submit Negotiated Levels of Performance Acknowledgement for 2026–2027.

JANUARY 15, 2027

- ☐ Upload the Locally Articulated Course List.
- ☐ Submit 9–14 Career Pathways Documentation.
- ☐ Submit Mid-Year Local Plan and Budget status update.
- ☐ Submit XDBR as of December 31, 2026.
- ☐ Submit Semi-annual Time Certifications for the period of July–December 2026.

APRIL 9, 2027

- ☐ Submit 2025–2026 BIA Verification Form.
- ☐ Submit XDBR as of March 31, 2027.

APRIL 21, 2027

- ☐ Attend the Spring Perkins Meeting.

MAY 15, 2027

- ☐ Deadline for final modifications. No modifications will be accepted past May 15, 2027.
- ☐ Submit new CLNA.

JULY 9, 2027

- ☐ Submit the final XDBR month-ending June 30, 2027.
- ☐ Submit semi-annual time certifications for January–June 2027.
- ☐ Submit Year-End report.
- ☐ Upload final Local Plan and Budget status update.

Perkins V Overview

The Strengthening Career and Technical Education for the 21st Century Act (hereafter referred to as Perkins V) amended the Carl D. Perkins Career and Technical Education Act of 2006. Perkins V is a federal education program that invests in secondary and postsecondary Career and Technical Education (CTE) programs.

Perkins V is dedicated to increasing learner access to high-quality CTE Programs of Study by seeking to ensure these programs meet the changing needs of learners and employers with a focus on systems alignment and program improvement. CTE Programs of Study funded by Perkins V must prepare learners for in-demand, high-skill, or high-wage careers.

Perkins V emphasizes real-world skills and practical knowledge within the National Career Clusters® Framework. CTE Programs of Study are educational options that provide learners at the secondary and postsecondary levels with the knowledge and skills needed for future careers through collaboration between education institutions and local employers and communities.

CTE Programs of Study sit at the intersection of education, workforce development, and economic development. Perkins V has strong ties with the Elementary and Secondary Education Act (ESEA), the Workforce Innovation and Opportunity Act (WIOA), and The Higher Education Act (HEA). These connections occur through coordinated planning and implementation requirements, cross-statute stakeholder input, and aligned definitions and accountability indicators.

Statutory Authority

North Carolina General Statute Part 1, G.S. 115C-151 through G.S. 115C-158, established the purpose, provided definitions, designated the State Board of Education (hereafter referred to as the State Board) as the sole state agency for the administration of Career and Technical Education and to accept all benefits of federal Career and Technical Education acts passed by the United States Congress, authorized funding, and established responsibility of local boards of education for Career and Technical Education. It also identified the duties of the State Board and the standards for approval of Career and Technical Education Local Plans or Applications.

Through a collaborative CTE State Plan between the North Carolina Department of Public Instruction (NCDPI) and the North Carolina Community College System (NCCCS), in accordance with North Carolina Statute Chapter 115C, Article 10, the State Board administers the Perkins V basic federal grant through a formula, non-competitive grant process and the full allocations in accordance with the federally approved state plan. NCDPI and NCCCS staff are responsible for the distribution and management of the federal grant to local grant recipients comprised of North Carolina Community College System Colleges and North Carolina Public School Units. The current North Carolina CTE State Plan can be found on the Perkins Collaborative Resource Network website.

Purpose of Perkins V

Section 2 states the purpose of the Perkins funding is to develop more fully the academic knowledge and technical and employability skills of secondary education students and postsecondary education students who elect to enroll in CTE programs and programs of study through the following activities:

1. Build on the efforts of states and localities to develop challenging academic and technical standards. This includes assisting students in meeting such standards, preparing them for high-skill, high-wage, or in-demand occupations in current or emerging professions.
2. Promote the development of services and activities that integrate rigorous and challenging academic Career and Technical instruction. These activities should also link secondary education and postsecondary education for participating Career and Technical Education students.
3. Increase state and local flexibility in providing services and activities designed to develop, implement, and improve Career and Technical Education.

4. Conduct and disseminate national research, sharing information on best practices that improve Career and Technical Education programs and programs of study, services, and activities.
5. Provide technical assistance that:
    a. Promotes leadership, initial preparation, and professional development at the state and local levels.
    b. Improves the quality of Career and Technical Education teachers, faculty, administrators, and counselors.
6. Supports partnerships among secondary schools, postsecondary institutions, baccalaureate degree-granting institutions, area Career and Technical Education schools, local workforce investment boards, business and industry, and intermediaries.
7. Offer individuals opportunities throughout their lifetimes to develop, in conjunction with other education and training programs, the knowledge and skills needed to keep the United States competitive.
8. Increase employment opportunities for populations who are chronically unemployed or underemployed, including individuals identified by Perkins V as a special population.

Essential Activities of Perkins V

Section 135 mandates *six essential activities,* which must be accounted for even in the absence of specific grant funding in those domains. Colleges are required to document actions taken within each of these areas and identify the source of funding supporting them, whether it be Perkins, local/state, both, other, or none. The mandated activity areas include:

1. Conducting career exploration and development activities within a structured and systematic framework.
2. Offering professional development opportunities for CTE educators.
3. Ensuring CTE Programs of Study provide the skills necessary for pursuing careers in high-skill, high-wage, or in-demand industries or roles.
4. Facilitating the integration of academic competencies into CTE programs.
5. Develop a strategy to implement components that enhance the execution of CTE programs and studies, leading to improved student outcomes.
6. Creating and executing an evaluation plan for activities financed through Perkins.

PROGRAMS OF STUDY

Programs of Study are emphasized throughout Perkins V. Section 3(41) defined Programs of Study as a coordinated, non-duplicative sequence of academic and technical content at the secondary and postsecondary level that incorporate challenging, state-identified academic standards and address academic and technical knowledge as well as employability skills aligned to the needs of industries, the region, and state.

Perkins V defines a “Programs of Study” as a coordinated, nonduplicative sequence of academic and technical content at the secondary and postsecondary level that:

1. Incorporates challenging state academic standards, including those adopted by a state under section 1111(b)(1) of the Elementary and Secondary Education Act of 1965.
2. Addresses both academic and technical knowledge and skills, including employability skills.
3. Is aligned with the needs of industries in the economy of the state, region, Tribal community, or local area.
4. Progress in specificity (beginning with all aspects of an industry or career cluster and leading to more occupation-specific instruction).
5. Has multiple entry and exit points that incorporate credentialing.
6. Culminates in the attainment of a recognized postsecondary credential.

Postsecondary Perkins also recognizes the WIOA definition of a career pathway (WIOA, Section 3) which is a combination of rigorous and high-quality education, training, and other services that:

1. Aligns with the skill needs of industries in the economy of the state or regional economy involved.
2. Prepares an individual to be successful in any of a full range of secondary or postsecondary education options, including apprenticeships registered under the Act of August 16, 1937 (commonly known as the "National Apprenticeship Act"; 50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.) (referenced to individually in this Act as an "apprenticeship", except in section 3226 of this title).
3. Includes counseling to support an individual in achieving the individual's education and career goals.
4. Includes, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.
5. Organizes education, training, and other services to meet the needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable.
6. Enables an individual to attain a secondary school diploma or its recognized equivalent, and at least one recognized postsecondary credential.
7. Assists an individual enter or advance within a specific occupation or occupational cluster.

SUPPORTIVE SERVICES

Perkins V calls for coordinated *Supportive Services* for students identified in CTE Programs of Study as special populations. Section 3(50) defined Support Services as "services related to curriculum modification, equipment modification, classroom modification, supportive personnel (including paraprofessionals and specialized instructional support personnel), and instructional aids and devices. Many of these services can be obtained by networking and blending existing programs in the community that serve these populations.

WORK-BASED LEARNING

Section 3(55) defines *work-based learning* sustained interactions with industry or community professionals in real workplace settings (simulated environments as well) that foster in-depth, first-hand engagement with the tasks required of a given career field and must be aligned to curriculum and instruction.

ACCOUNTABILITY

Section 113(b)(1)(B) outlines the following postsecondary indicators of program performance:

1P1: The percentage of CTE concentrators who during the second quarter after program completion remain enrolled in postsecondary education, are in advanced training, military service, a service program, the Peace Corps, or are placed or retained in employment.

2P1: The percentage of CTE concentrators who receive a recognized postsecondary credential during participation in or within one year of program completion.

3P1: The percentage of CTE concentrators in CTE programs that lead to non-traditional fields.

COMPREHENSIVE LOCAL NEEDS ASSESSMENT (CLNA)

Section 134(c) outlines the requirement for a *Comprehensive Local Needs Assessment (CLNA)*. The CLNA is a biennial CTE program-wide assessment designed to shape the local strategy and encompasses evaluations across five critical areas.

1. Analysis of student achievements using performance indicators, focusing on the outcomes of special populations and various subgroups.
2. Evaluation of whether CTE programs are adequately expansive, comprehensive, and high-quality to fulfill the requirements of all students served by the college, and if these programs align with current labor market demands.
3. Examination of the advancements made in the rollout of CTE programs and programs of study.
4. Strategies for enhancing the recruitment, retention, and training of CTE professionals, with an emphasis on increasing representation from underrepresented groups within these roles.
5. Assessment of the progress in ensuring all students have equal opportunities to access high-quality CTE courses and programs of study.

Each college will consult local stakeholders (see Section 134 (d)) during the CLNA process and development of the Local Application.

LOCAL APPLICATION

Section 134 outlines the Local Application process to qualify for Perkins V funding. Each college must submit a *Local Application* comprising the following components:

1. An overview of the comprehensive local needs assessment conducted.
2. Details on state approved CTE programs of study offered by the college.
3. Strategies for collaborating with local workforce boards, workforce agencies, one-stop delivery systems, and other partners to offer a range of career exploration and guidance activities.
4. Approaches to enhance both academic and technical skills of CTE students by integrating and strengthening the academic and CTE components of their programs.
5. Measures to provide activities aimed at preparing special populations for high-skill, high-wage, or in-demand careers leading to self-sufficiency, to prepare students for non-traditional fields, to ensure equal access for special populations to CTE courses and programs, and to prevent discrimination against members of special populations.
6. An outline of work-based learning opportunities available to CTE students and plans for collaborating with employer representatives to develop or augment such opportunities.
7. Information on how the college facilitates CTE students' ability to earn postsecondary credit while still in high school.
8. A description of efforts to support the recruitment, preparation, retention, and training, including professional development of teachers, faculty, administrators, and specialized instructional support personnel.
9. A continuous improvement plan aimed at addressing any disparities or gaps in student performance from one planning year to the next.

LOCAL (PERKINS BASIC GRANT) FUNDS

Local (Perkins Basic Grant) Funds are designated by Section 135 for the development, coordination, implementation, and enhancement of Career and Technical Education CTE programs, aligning with the requirements identified in the CLNA. In essence, the distribution of local Perkins basic grants to colleges is contingent upon their local needs assessment, ensuring that the deployment of these funds is consistent with the outcomes of the CLNA**.**

SPECIAL POPULATIONS

Perkins V aims to ensure equity for designated special populations by mandating the evaluation of data specific to these groups. Section 3(48) and Section 114(e)(8)(B)(i) defines special populations to include:

1. Individuals with disabilities.
2. Individuals from economically disadvantaged families, including those who are low-income youth and adults.
3. Individuals training for careers in non-traditional fields.
4. Single parents, including single pregnant women.
5. Individuals re-entering the workforce.
6. English language learners.
7. Homeless individuals as defined under section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a).
8. Youth who are in or have aged out of the foster care system.
9. Youth with a parent who:
    a. Serves in the armed forces, as defined in section 101(a)(4) of title 10, U.S.C.; and
    b. Is on active duty, as defined in section 101(d)(10) of the same title.
10. Students from major racial and ethnic groups.

STATE LEADERSHIP ACTIVITIES

Section 124 outlines the process for States to use Perkins V funds to conduct statewide innovative activities to inform and improve CTE programs. NCCCS reserves a percentage of the State Leadership funds to implement CTE Leadership Projects. These projects support sustainable innovation to enhance CTE Programs of Study implementation, promote student opportunities and access, align CTE Programs with workforce needs or demands, improve student outcomes, provide professional development and training for CTE faculty and staff, or promote data-driven decision-making for continuous improvement.

CTE Leadership Projects are funded by Perkins V to improve CTE, which designated leadership funds to support:

- Preparation for non-traditional fields in current and emerging professions.
- Programs for individuals in State institutions such as correctional institutions.
- Programs that expose students including special populations to high-skill, high-wage and in-demand occupations.
- Programs that recruit, prepare or retain Career and Technical Education teachers, faculty, specialized instructional support—pre-service, professional development, or leadership development.
- Technical assistance for eligible recipients.
- Report on the effectiveness of the use of such funds in achieving goals for preparing an educated and skilled workforce, meeting the skilled workforce needs of employers including in existing and emerging in-demand industry sectors and occupations as identified by the state, and, how the state's Career and Technical Education programs help to meet those goals in reducing disparities or performance gaps state determined levels of performance of all CTE concentrators.

Applications for CTE Leadership Projects are released in the spring with project implementation for the next program year.

Allocation of the Perkins V

Section 112 and 132 outlined the allocation process for State and Local Perkins allocations.

State Allocation

North Carolina's State allocation of Perkins V funds is split between secondary and postsecondary with secondary (middle and high schools) receiving 66.67% and postsecondary (colleges) receiving 33.33% of the State allocation. Of the funds received at the postsecondary level, 85% is distributed to the colleges, and 15% is for state-level expenditures.

ADMINISTRATION

Section 112(a)(3) states up to 5% of the postsecondary State allocation is set aside for the administration of the state plan and grant administration.

LEADERSHIP

Section 112(a)(2) states up to 10% of the postsecondary State allocation must be used for state leadership innovation projects. There are specific mandatory and permissive leadership activities allowed by Section 112(a)(2) and Section 124.

RESERVE FUND

Section 112(c) allows the use of a *Reserve Fund* to address high numbers and percentages of students in CTE programs in rural areas; stressing rigorous academic standards at the postsecondary level while referencing the WOIA term recognized postsecondary credential, which includes industry-recognized credentials and certificates, diplomas, or associate degrees at the sub-baccalaureate level. NCCCS will take advantage of section 112(c) to Reserve Funds for program year 2026–2027.

Local College Allocation Formula

Local allocations to colleges are determined using the formula in Section 132, which is based on each college's share of eligible postsecondary CTE students. The calculation uses the number of students who receive Pell Grants and Bureau of Indian Affairs (BIA) assistance and who have completed at least 12 credit hours in an approved CTE program of study while pursuing a credential. Each college receives a pro rata share based on its portion of these eligible students compared to the statewide total.

$$\frac{\text{Number of Pell and BIA CTE concentrator students at the college}}{\text{Total number of Pell and BIA CTE concentrator students statewide}} = \text{Percentage of Pell and BIA CTE students at the college} \times \text{Total funds available for distribution}$$

Colleges or consortia of colleges offering CTE programs are eligible for Perkins V funds provided that the funding to be allocated through the formula-funding process is not less than $50,000. Colleges not meeting a minimum of $50,000 using the formula are not eligible to receive a direct allotment. However, a consortium of one or more colleges may be formed as defined by Section 3(19). In a consortium, one college is designated as the fiscal agent, and the consortium receives the total amount each college would have received individually. Colleges must plan their Local Plan and Budget together based on the needs of the regional CLNA as outlined in Section 131(f).

BIA VERIFICATION PROCESS

Each spring, the *Bureau of Indian Affairs Information* will be verified by local Perkins Program Coordinator. Colleges are responsible for reporting the number of CTE students receiving BIA assistance. Local Financial Aid staff usually assist in collecting this data.

Fiscal Year and State Board Approval

Perkins V funds are allocated to colleges using the above Local Basic Grant formula through an annual allotment from the North Carolina State Board of Community Colleges (SBCC). Perkins V allotments are available from July 1 through June 30, and all funds must be expended by June 30 of the applicable program year in accordance with federal and state fiscal requirements.

In the event that the North Carolina General Assembly does not enact a biennium budget or the SBCC does not approve annual allotments prior to July 1, NCCCS will operate under the continuing budget authority provisions of the State Budget Act, G.S. 143C-5-4. Under this statute, state agencies are authorized to continue operations at a level not to exceed the recurring certified budget from the prior fiscal year until a budget or allotment is enacted.

Because Perkins V funds have a statutory allocation period beginning July 1, allowable expenditures incurred on or after July 1 may be charged to Perkins once the federal allotment is approved and released by the SBCC. This includes eligible CTE-related salaries and benefits accrued during the period of continuing resolution, consistent with guidance in the North Carolina State Budget Manual and subject to federal allowability rules and proper documentation.

NCCCS receives 30% of the annual Perkins V allocation during the first quarter of the program year (July–September), with the remaining 70% distributed in October for use during the remainder of the year. As a result, colleges should plan budgets, activities, and expenditures accordingly to ensure cash flow alignment, timely implementation of approved activities, and effective use of Perkins V funds throughout the program year.

Any Perkins V funds remaining unexpended as of June 30 are reverted to NCCCS in accordance with the State Budget Act and applicable fiscal policies. Reverted funds are subsequently redistributed to colleges as carryforward funds using the same Local Basic Grant formula, ensuring continued support for CTE program improvement while maintaining statutory and fiscal compliance.

Accountability: Core Indicators of Performance

Section 113(b)(2) identified the following three accountability measures called the Core Indicators of Performance.

Indicator Title	Perkins V Section	Indicator Description
1P1 – Postsecondary Retention and Placement	Section 113(b)(2)(B)(i)	"The percentage of CTE concentrators who, during their second quarter after program completion, remain enrolled in postsecondary education, are in advanced training, military services, or a service program that receives assistance under title I of the National and Community Service Act of 1990, are volunteers as described in section 5(a) of the Peace Corps Act or are placed or retained in employment."
2P1 – Curriculum Certificate, Diploma, or Associate Degree Attainment	Section 113(b)(2)(B)(ii)	"The percentage of CTE concentrators who receive a recognized postsecondary credential during participation or within 1 year of program completion."
3P1 – Non-traditional Program Enrollment	Section 113(b)(2)(B)(iii)	"The percentage of CTE concentrators in career and technical programs and programs of study that lead to non-traditional fields."

Negotiated Levels of Performance

Section 113(b)(4) requires colleges to collaborate with NCCCS annually to set a Level of Performance for each Core Indicator of Performance. In North Carolina, Levels of Performance are calculated by averaging the actual performance data from the previous two available program years and increasing the average by 0.01.

IMPROVEMENT PLAN PROCESS

Per Section 123(b)(2), colleges that do not achieve at least 90% of their agreed-upon Levels of Performance for each Core Indicator of Performance are required to develop an improvement plan. The improvement plan must outline actionable steps aimed at elevating their performance. NCCCS will assess the adequacy and relevance of these proposed plans and provide feedback as needed.

Per Section 123(b)(4)(A), should a college fail to meet or demonstrate substantial progress toward the Levels of Performance for two consecutive years, they may be instructed to allocate a specified portion of their Perkins funding to address the shortfall in the Core Indicators of Performance concerned.

Data Dissemination

The NCCCS Data Dashboards provide visibility of each college's achievement toward the state and local Levels of Performance. Th dashboards provide disaggregated data as required by Section 134(c)(2) to assist in identifying performance trends and gaps among different student groups, including special populations in the CLNA.

Data Privacy

The North Carolina Community College System protects the privacy of student education records in accordance with the Family Educational Rights and Privacy Act (FERPA), applicable state laws, and system policies. Student data is used only for legitimate educational, administrative, and reporting purposes and is disclosed only as permitted by law.

Special Population Data Collection Methods

The following table outlines methods NCCCS utilizes to collect the required special population subgroup data.

Special Population Subgroup	Data Collection Method or Process
Individuals with disabilities	Qualified students are identified by the college's Disability Services Office in Colleague CFNC profile nonrequired field asks for Disability/Handicap and includes options of Blind, Deaf, Physical handicapped, Learning disability
Individuals from economically disadvantaged families, including low-income youth and adults	Not on CFNC. Perkins uses a curriculum CTE student (concentrator) who is a PELL recipient
Individuals preparing for non-traditional fields	CFNC required field on application is male or female. We use the NAPE non-traditional crosswalk of fields to determine which programs are included. Students of the non-traditional gender who are enrolled in these programs meet this population
Single parents, including single pregnant women	Not on CFNC. Perkins uses self-identification if colleges ask students and enter it into colleague
Out-of-workforce individuals	Not on CFNC. Perkins currently uses answers to CFNC questions asking them if they were employed (FT, PT, or not) at entry to the community college.
English Language Learner	CFNC nonrequired field asks what your primary language is. CFNC does not ask if they are an English Learner
Homeless individuals described in section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a)	NC Perkins defines homeless individuals as 18 years old and under for reporting purposes. NCCCS does not include this special population in the dashboards. CFNC asks, "Are you a homeless individual? If you click then? it says, "An individual who lacks a permanent place to live (i.e. shelter or temporary housing facility) or lives in a location that is not typically used as a residence (i.e. bus station, campground, car, or park)."
Youth who are in, or have aged out of, the foster care system	NCCCS does not include this special population in the dashboards for reporting purposes. CFNC application required field asks, "Are you a youth in foster care/aged out of foster care?" Options are yes, no, choose not to respond. If you click, then? it says, "An individual who is currently in foster care or has aged out of the foster care system at age 18."

Special Population Subgroup	Data Collection Method or Process
Youth with a parent who is a member of the armed forces or is on active duty	NCCCS does not include this special population in the dashboards for reporting purposes.
Students from major racial and ethnic groups	CFNC application nonrequired field asks if Hispanic or Latino, or Not Hispanic or Latino If you click the? it says “Hispanic/Latino: Mexican, Puerto Rican, Cuban, Central or South American or other Spanish origin or culture, regardless of race” CFNC application nonrequired field offers a selection of American Indian or Alaska Native, Asian, Black, or African American, Native Hawaiian or Other Pacific Islander, or White, and allows the selection of more than one

Comprehensive Local Needs Assessment

Section 134(c) outlines conducting a Comprehensive Local Needs Assessment (CLNA) every two years as an eligibility requirement for the Perkins Basics Grant. The CLNA must be assess all Career and Technical Education curriculum Programs of Study at a college to identify and address needs or gaps in student performance; program size, scope, and quality; aligned career pathways; faculty professional development, and ensuring universal access for all students, with particular attention to special population students who elect to enroll in the curriculum CTE Programs of Study.

The needs identified through the CLNA provide the justification for prioritizing Perkins Basic Grant funds in Local Application and Local Plan/Budget and ensure that funding is targeted toward addressing the most critical gaps. The CLNA is not an isolated report but a foundational planning tool. Colleges are expected to demonstrate a clear connection between CLNA findings, stakeholder input, and how Perkins V funds are ultimately used to improve CTE program quality, access, and workforce relevance.

The CLNA Process

Colleges must conduct a CLNA every two years to guide local planning, program improvement, and Perkins V funding decisions. While specific methods may vary by institution, an effective CLNA generally includes the following steps.

1. Establish a CLNA leadership team, define roles and responsibilities, and develop a work plan and timeline.
2. Identify and confirm required stakeholders.
3. Gather and analyze the required data for each CLNA component.
4. Actively engage required stakeholders to review data, validate findings, and provide context.
5. Identify gaps, needs, root causes, equity gaps, and program improvement opportunities based on data and stakeholder feedback, colleges
6. Determine and prioritize which gaps and needs will be addressed using Perkins funds and other resources.
7. Document the findings in the CLNA Summary Report.
8. Submit the CLNA Summary Report to NCCCS for review and approval.

REQUIRED STAKEHOLDERS

Section 134(d) requires the consultation of a broad range of stakeholders to ensure that CTE programs are responsive to student needs and labor market demand. Required stakeholders include:

- Secondary CTE Director
- Secondary CTE teachers and staff
- Secondary Career Development Coordinators
- College CTE faculty and instructional staff
- College Administrators and Perkins Leadership
- College Disability Services
- Local business and industry representatives (aligned to local labor market needs)
- Local workforce development board representatives
- Economic development partners
- Vocational rehabilitation partners
- Department of Social Services Director (or designee)
- Indian Tribe or Tribal organization (if applicable)
- Representatives of special populations
- Students, recent graduates, and parents (recommended best practice)

Stakeholder engagement may occur through advisory committee meetings, focus groups, surveys, interviews, or structured work sessions and can be held in-person or in virtual environments. Ensure engagement is inclusive, documented, and aligned to decision-making.

Continuous Consultation

Colleges are encouraged to build structures for continuous collaboration with required stakeholders to maintain the relevance and responsiveness in strengthening CTE programs to meet community employment needs. This structured approach to stakeholder involvement and continuous consultation is designed to ensure that CTE programs remain dynamic, and supportive in addressing the evolving needs of students, employers, and the broader community through:

- Programs of Study being responsive to community employment needs.
- Alignment with the employment priorities of the state, regional, and local economy as identified by employers and informed by labor market data.
- Programs being designed to meet current, intermediate, and long-term labor market projections.
- Employer input being integrated into the development and implementation of Programs of Study concerning relative standards, curriculum, industry-recognized credentials, and the use of current technology and equipment.

SAMPLE TIMELINE

The timeline below illustrates a common approach for completing the CLNA within a one year planning cycle. Colleges may adjust the timeline to align with local planning, budgeting, and Perkins application deadlines.

Timeframe	Key Activities
July – August	Establish CLNA team; review prior CLNA findings; develop work plan and stakeholder engagement strategy.
September – October	Collect and analyze Perkins V performance data, labor market information, and program quality indicators.
November – December	Conduct stakeholder consultations; gather qualitative feedback; validate data findings.
January – February	Identify priority needs, equity gaps, and root causes. Align CLNA findings to Perkins funding priorities and local application planning.
March – April	Finalize CLNA documentation; integrate results into program improvement and budget decisions.
May	Submit CLNA Summary Report.

CLNA Components

Section 134(c)(2) outlines specific components of the CLNA. The section describes the required components and provides information on how to evaluate each required component.

SECTION A: EVALUATION OF STUDENT PERFORMANCE

Section 134(c)(2)(A) requires “an evaluation of the performance of the students served by the eligible recipient with respect to State determined and local levels of performance established pursuant to section 113, including an evaluation of performance for special populations and each subgroup described in section 1111(h)(1)(C)(ii) of the Elementary and Secondary Education Act of 1965.”

Section A of the CLNA aims to assess student performance on the three Core Indicators of Performance to rigorously assess the performance of all students enrolled in approved curriculum CTE Programs of Study.

The CLNA review will assess actual student performance levels on the two most recent program years predetermined state and local Level of Performance of the Core Indicators of Performance, disaggregated by gender and race and ethnicity as well as by the special population subcategories.

Recommended Types of Evidence to Collect

Gather following types of evidence for the evaluation of student performance:

- NCCCS Data Dashboards
- NCCCS Power BI Dashboards

New or existing curriculum program reviews, advisory board meeting minutes, faculty feedback, and student testimonials can be effective supplement quantitative data with qualitative insights to gain a more nuanced understanding of the factors influencing performance levels.

Recommended Steps for Investigation

1. Utilize evidence collected to analyze student performance of the Core Indicators of Performance.
2. Use the following conversation starters with stakeholders:
    - How are students in my CTE programs performing on the Negotiated Levels of Performance?
    - How are students from special populations performing?
    - How are students from different genders or races and ethnicities performing?
    - Which groups of students are struggling the most in CTE programs?
    - Where do the biggest gaps in performance exist between subgroups of students?
    - Which CTE programs overall have the highest outcomes, and which have the lowest?
    - Are there certain CTE programs where special populations are performing above average? Below average?
    - What are the potential root causes of inequities in my CTE programs?
    - Does student performance align with the goals and objectives set forth by the college and the broader needs of the community and employers.
3. Identify needs or gaps in student performance.
4. Identify root causes for any disparities or inequities.

SECTION B1*:* CTE PROGRAM QUALITY

Section 134(c)(2)(B)(i) requires "a description of how Career and Technical Education programs offered by the eligible recipient are (in) sufficient in size, scope and quality to meet the needs of all students served by the eligible recipient…"

Section B1 aims of this evaluation is to analyze the alignment, effectiveness, and outcomes of curriculum CTE Programs of Study in meeting the needs of students and employers in preparation for in-demand, high-skill, or high-wage career pathways. Size, scope, and quality evaluation serves as the foundational criteria for assessing and strengthening all aspects of CTE Programs of Study, ensuring that every section of the CLNA is built upon a framework that supports universal access, meaningful outcomes, and alignment with workforce needs.

Program Component	Definition
Size	Size refers to the structural capacity of CTE programs to serve students effectively and meet regional workforce needs. To meet the definition of size, a program must: • Offer curriculum CTE Programs of Study approved by the North Carolina State Board of Community Colleges in accordance with State Board Code 1D SBCCC 400. • Offer an adequate number of programs and courses to support concentrator status and student progression toward credential attainment or employment. • Maintain adequate enrollment levels, ensuring a sufficient number of students are served to justify program sustainability. • Employ a sufficient number of qualified instructors and staff to support program delivery and student success.
Scope	Scope reflects the breadth and depth of CTE Programs of Study and their alignment with educational and workforce demands. To meet the definition of scope, a program must: • Deliver a sequenced curriculum that progresses from foundational to advanced technical and academic content. • Address the full breadth of the subject matter, including employability and leadership skills essential for career success. • Align program content with regional workforce needs, ensuring relevance to current and emerging labor market demands. • Prepare students for multiple career opportunities by embedding transferable skills and stackable credentials that enable mobility across occupations and industries. • Establish clear linkages between secondary and postsecondary education through articulation agreements, dual enrollment, or credit transfer pathways. • Integrate work-based learning experiences, such as internships, apprenticeships, and clinical placements, to reinforce real-world application of skills. • Work toward promoting Career and Technical Student Organization (CTSO) participation to foster leadership, teamwork, and career readiness. • Establish multiple entry and exit points to a Program of Study, as appropriate.
Quality	Quality reflects the program's ability to prepare students for success in high-skill, high-wage, or in-demand occupations through intentional design, delivery, and continuous improvement. To meet the definition of quality, a program must: • Verify current program approval or accreditation status through the North Carolina State Board of Community Colleges and relevant regulatory accrediting bodies. • Deliver comprehensive instruction that includes employability, leadership, and career readiness skills aligned with industry expectations. • Work toward embedding work-based learning experiences such as internships, apprenticeships, and clinical placements to reinforce real-world skill application. • Work toward Integrating student engagement in CTSOs to cultivate leadership, teamwork, and professional development. • Maintain equipment and lab environments that reflect current industry standards.

Program Component	Definition
	• Engage in continuous improvement by analyzing performance data, incorporating stakeholder feedback, and implementing strategies identified through the Comprehensive Local Needs Assessment (CLNA). • Ensure faculty qualifications and professional development to maintain instructional excellence and alignment with evolving industry practices. • Engage advisory committees composed of industry, education, community stakeholders, and current and former students to validate program relevance and guide improvement efforts. • Provide reasonable access and support for special populations by integrating strategies to reduce barriers, close achievement gaps, and promote student success.

Recommended Types of Evidence to Collect

Gather following types of evidence for the evaluation of CTE program quality:

- Data on Programs of Study student participant and concentrator rates
- Data on graduate employment rates
- Institutional effectiveness reports
- Student performance section data
- Student interest survey results
- Feedback from faculty, students, advisory committees, and industry partners
- CTE Programs of Study sequence and aligned curriculum documents
- Credit transfer agreements
- Secondary and postsecondary dual enrollment data
- Data on student attainment of credentials and articulated credit
- Curriculum standards that show depth and breadth of programs
- Course informational and instructional materials
- Work-based learning opportunities and participation data
- Career and Technical Education Student Organizations (CTSO) activities

Recommended Steps for Investigation

1. Utilize evidence collected to analyze program size, scope, and quality.
2. Use the following program size conversation starters with stakeholders:
   - Is the curriculum a CTE Program of Study approved by the North Carolina State Board of Community Colleges in accordance with State Board Code 1D SBCCC 400?
   - Does the program offer an adequate number of programs and courses to support concentrator status and student progression toward credential attainment or employment
   - Are enrollment levels sufficient to justify program sustainability?
   - Is there an adequate number of qualified instructors and staff to support program delivery and student success?
   - Are class sizes and instructional resources appropriate to support high-quality learning outcomes?
   - Are the programs aligned with regional job demand? If not, how does labor market data show that the number of graduates meets local employment needs?
3. Use the following program scope conversation starters with stakeholders:
   - Is curriculum sequenced to progress from foundational to advanced technical and academic content?
   - Do the programs address the full breadth of the subject matter, including employability and leadership skills?

- Does content align with regional workforce needs and respond to current and emerging labor market demands?
- How do programs prepare students for multiple career opportunities through transferable skills and stackable credentials?
- Summarize the linkages between secondary and postsecondary education, including articulation agreements, dual enrollment, or credit transfer pathways.
- Do programs have work-based learning experiences (e.g., internships, apprenticeships, clinical placements) are integrated to reinforce real-world skill application?
- Is CTSO participation promoted to support leadership, teamwork, and career readiness?
- Do programs establish multiple entry and exit points to accommodate diverse learner needs and career pathways?

4. Use the following program quality conversation starters with stakeholders:
   - List gaps or barriers in the CTE Program impeding students in becoming full program concentrators.
   - Describe gaps or barriers in the CTE Program deterring students from earning a recognized postsecondary credential.
   - Do programs have approval or accreditation through the North Carolina State Board of Community Colleges and relevant accrediting bodies?
   - List any gaps in embedding work-based learning experiences (e.g., internships, apprenticeships, clinical placements) to reinforce real-world skill application.
   - List any gaps in how students engage in Career and Technical Student Organizations (CTSOs) to build leadership, teamwork, and professional development.
   - List any gaps in equipment and lab environments that do not reflect current industry standards and how advisory committees validate this alignment.
   - List any gaps in faculty qualifications and professional development needed to support instructional excellence and industry relevance.
   - List any gaps programs have in providing equitable access and support for special populations, including strategies to reduce barriers and close achievement gaps.
5. Identify needs or gaps in program size, scope, and quality.
   - Pay special attention to areas where program offerings may not fully align with high-skill, high-wage, or in-demand industry sectors or where improvements are needed to enhance program quality and relevance.
6. Identify root causes for any disparities or inequities.

SECTION B2: ALIGNMENT TO LOCAL LABOR MARKET NEEDS

Section 134(c)(2)(B)(ii) requires a description of how CTE Programs of Study are "aligned to State, regional, Tribal, or local in-demand industry sectors or occupations identified by the State workforce development board described in section 101 of the Workforce Innovation and Opportunity Act (29 U.S.C. 3111) or local workforce development board, including career pathways, where appropriate," or "designed to meet local education or economic needs not identified by State boards or local workforce development boards."

Section B2 evaluates how well CTE Programs of Study meet the current and projected needs of students and employers through examining market data and industry trends to identify mismatches or opportunities for program expansion or enhancement. The CLNA should analyze the outcomes of program concentrators and graduates, including employment rates in relevant fields, wage levels, and further education or training pursuits. The evaluation should consider the extent to which graduates are meeting local workforce needs.

Connection to Propel NC

The evaluation criteria in Section B2 directly supports the goals of Propel NC. Propel NC emphasizes strong alignment between education and workforce needs, ensuring that programs are responsive to labor market demand, support economic mobility, and prepare learners for meaningful employment.

Through the CLNA evaluation, CTE Programs of Study are evaluated for alignment with state, regional, and local in-demand industry sectors identified by workforce development boards, as well as for their ability to address locally defined education and economic needs. By examining labor market data, industry trends, and employer demand, the CLNA helps identify opportunities for program expansion, enhancement, or realignment to advance Propel NC's focus on workforce alignment and employer engagement.

The analysis of concentrator and graduate outcomes, including employment rates, wage levels, and continued education or training, reinforces Propel NC's commitment to economic mobility and student success. Evaluating the extent to which CTE graduates meet local workforce needs ensures that programs not only respond to current labor market conditions but also contribute to long-term regional prosperity and talent development, consistent with Propel NC.

Recommended Types of Evidence to Collect

Gather following types of evidence to review during your evaluation of alignment to local labor market needs:

- Propel NC defined lists of in-demand industry sectors
- Labor Market Reports
- Instructional FTE Dashboard
- CTE Earnings by Prosperity Zone
- NCWorkforce Credentials List
- Data on Programs of Study student participant and concentrator rates
- Data on graduate employment rates
- Institutional effectiveness reports
- Student performance section data
- Student interest survey results
- Feedback from faculty, students, advisory committees, and industry partners
- CTE Programs of Study sequence and aligned curriculum documents
- Credit transfer agreements
- Secondary and postsecondary dual enrollment data
- Data on student attainment of curriculum credentials and articulated credit
- Results of any available gap analysis on educational outcomes and employment
- Real-time job postings data from online search engines

Recommended Steps for Investigation

1. Utilize evidence collected to analyze alignment to local labor market needs.
2. Use the following conversation starters with stakeholders:
    - What industries are projected to grow the most in my local area? What occupations?
    - How do my CTE program enrollments match projected job openings? Where are the biggest gaps? Are more/less students being prepared for these occupations than the need indicates?
    - What are the emerging occupations in my area to which students should be exposed?
    - What skill needs have industry partners identified as lacking in my programs?
    - Are graduates of our CTE programs finding employment opportunities aligned to their concentration?

    - What opportunities exist in the local labor market for CTE students with disabilities, English learners, or other special populations?
3. Identify needs or gaps in alignment to local labor market needs.
4. Identify root causes for any disparities or inequities.

SECTION C: CTE CAREER PATHWAYS AND PROGRAMS OF STUDY IMPLEMENTATION

Section 134(c)(2)(C) requires "an evaluation of progress toward the implementation of career and technical education programs and programs of study."

Section C aims to assess the integration, coherence, and alignment of CTE Programs of Study with secondary and postsecondary education pathways, including 9–14 career pathways. This involves reviewing the existing program structures, evaluating the development and implementation of these programs, and identifying gaps or areas for improvement.

The evaluation should examine the extent to which community colleges develop sustainable relationships with students, secondary schools, businesses, industry, and other community stakeholders, including local area industry or sector partnerships, to continuously update and align programs of study with high-quality, high-wage, or in-demand skills in the state, regional, or local economy. This collaboration should involve business outreach staff in one-stop centers as defined by the Workforce Innovation and Opportunity Act (29 U.S.C. 3102) and other relevant organizations, such as community-based and youth-serving organizations.

Recommended Types of Evidence to Collect

Gather following types of evidence for the evaluation CTE career pathways and Programs of Study implementation:

- Program and pathway documentation: Existing CTE programs and pathways, including curriculum outlines and program development processes.
- Partnership agreements with secondary Public School Units.
- Credit transfer pathway documents
- Local labor market trends and projections for high-skills, high-wage, or in-demand skills and occupations.
- Feedback from a diverse range of stakeholders involved in the development and implementation of CTE programs, including faculty, students, industry partners, and advisory committees.
- Program marketing and recruitment materials
- Evidence of faculty participation in pathway development and assess gaps in CTE programs that align with secondary to postsecondary pathways.

Recommended Steps for Investigation

1. Utilize evidence collected to analyze CTE career pathways and Programs of Study implementation.
2. Use the following conversation starters with stakeholders:
    - How fully are programs aligned and articulated across secondary and postsecondary education?
    - Do programs incorporate relevant academic, technical, and employability skills at every learner level?
    - Do I have credit transfer agreements in place to help students earn and articulate credit?
    - Are students being retained in the same Program of Study?
    - Do students in the Programs of Study have multiple entry and exit points?
    - Are students in my programs earning recognized postsecondary credentials? Which ones?
    - Are secondary students in my programs earning dual enrollment credit?
3. Identify needs or gaps in career pathway implementation.

4. Identify root causes for any disparities or inequities.

SECTION D: IMPROVING CTE FACULTY RECRUITMENT, RETENTION, AND PROFESSIONAL DEVELOPMENT

Section 134(c)(2)(D) requires "a description of how the eligible recipient will improve recruitment, retention, and training of career and technical education teachers, faculty, specialized instructional support personnel, paraprofessionals, and career guidance and academic counselors, including individuals in groups underrepresented in such professions."

Section D aims at understanding how to enhance CTE faculty and staff recruitment, retention, and professional development. This effort aims to ensure that CTE faculty are well-equipped to meet the needs of students and the demands of industry, with a special emphasis on increasing the representation of underrepresented groups within CTE professions.

Recommended Types of Evidence to Collect

Gather following types of evidence for the evaluation of improving CTE faculty recruitment, retention, and professional development.

- State and college policies on instructor certification and licensing
- Data on faculty, staff, administrator, and counselor preparation; credentials; salaries and benefits; and
- demographics
- Description of recruitment and retention processes
- Descriptions of professional development, mentoring, and externship opportunities
- Data on educator participation in professional development, mentoring, and externship
- Findings from surveys/focus groups of educators' needs and preferences
- Data on educator and staff retention
- Information about faculty shortage areas and projections of future staffing needs

Recommend Steps for Investigation

1. Utilize evidence collected to analyze alignment to improving CTE faculty recruitment, retention, and professional development.
2. Use the following conversation starters with stakeholders:
   - How diverse is staff at the college? Does it reflect the demographic makeup of the student body?
   - What processes are in place to recruit and induct new faculty and staff? Are these processes efficient and effective, especially for faculty coming from industry?
   - Are all faculty teaching CTE programs adequately credentialed?
   - Does the college offer regular, substantive, relevant professional development opportunities?
   - What professional development offerings are most highly rated by participating staff?
   - What do faculty report as needs and preferences for professional development, benefits, and supports?
   - In what areas does the college need to develop or recruit more faculty?
3. Identify needs or gaps in improving CTE faculty recruitment, retention, and professional development
4. Identify root causes for any disparities or inequities.

SECTION E: UNIVERSAL ACCESS TO HIGH-QUALITY CTE PROGRAMS

Section 134(c)(2)(E) requires "a description of progress toward implementation of equal access to high-quality CTE courses and programs of study for all students , included—(i) strategies to overcome barriers that result in lower rates of access to, or performance gaps in, the courses and programs for special populations; (ii) providing programs that are designed to enable special populations to meet the local levels of performance; and (iii)

providing activities to prepare special populations for high-skill, high-wage, or in-demand industry sectors or occupations in competitive, integrated settings that will lead to self-sufficiency."

Section E reviews the effectiveness of strategies, programs, and activities designed to address barriers to access and performance for all students, with particular emphasis on Perkins special populations. This review examines how CTE programs implement evidence-based strategies to overcome identified performance gaps, provide targeted supports that enable special populations to meet local levels of performance, and deliver programs and services that prepare students for participation in high-skill, high-wage, or in-demand industry sectors or occupations in competitive, integrated settings that promote long-term self-sufficiency.

Recommended Types of Evidence to Collect

Gather following types of evidence for the evaluation of universal access to high-quality CTE Programs of Study:

- United States Census Data
- College and program enrollment data
- Data on participation and performance for students
- Program and course retention and competition data
- Program promotional and recruitment materials
- Career advising and guidance activities
- Processes for providing accommodations, modifications, and supportive services for special populations
- Information and procedures for WLB, accelerated credit, and credentials
- Findings from the root causes and strategies analysis from OGA
- Findings from surveys/focus groups with students, and community organizations that represent special populations
- Classroom instructional or non-instructional materials and environments
- Faculty and staff composition and representation
- Previous reports and evaluations of initiatives designed to prepare special populations for high-skill, high-wage, or in-demand careers
- Student and parent feedback

Recommended Steps for Investigation

1. Utilize evidence collected to analyze universal access for all students.
2. Use the following conversation starters with stakeholders:
    - Which population groups are underrepresented in CTE programs overall and in particular programs? Overrepresented?
    - Are there additional enrollment discrepancies related to high-wage, high-skill occupations?
    - What barriers currently exist that prevent special population groups from accessing or completing programs?
    - How are special population groups performing in programs?
    - What accommodations, modifications, and supportive services are currently provided to ensure the success of special population groups? Which ones are most effective? Which ones are underutilized?
    - What additional accommodations, modifications, and supportive services would help ensure access and equity for all?
3. Use the Advance CTE Questions for Reviewing OGA Data with stakeholders:
    - List the CTE clusters and programs in which enrollment by learner subgroup and special population is proportional to the region's population (as close to zero percentage points as possible).
    - List all the CTE clusters and programs that have one or more subgroups and/or special populations that are under-represented (list program and subgroup and/or special population).

- List all the CTE clusters and programs that have one or more subgroups and/or special populations that are over-represented (list program and subgroup and/or special population).
- What surprised you about the data?
- In what areas do you think you are doing well in serving all learners?

4. Identify potential availability and access barriers for all students.
5. Identify potential availability and access barriers for students from special populations.
6. Identify root causes for any disparities or inequities.

Reporting the Findings

The CLNA Summary Report is used to clearly document identified gaps, needs, barriers, and root causes across each required component of the CLNA. Findings must be organized under the appropriate CLNA section and presented in a concise, numbered or lettered bulleted format to ensure clarity, transparency, and ease of reference.

The CLNA Summary Report and the identified gaps serve as the primary evidence base for the development of the Local Application, Local Plan, and Perkins budget. Results of the CLNA analysis are used to prioritize strategies, activities, and investments that directly address documented gaps in program performance, size, scope, and quality; pathways alignment; staffing capacity; and equitable access to high quality CTE programs.

Identified needs guide the selection of allowable Perkins activities and ensure that funding decisions are intentional, data driven, and aligned with student and workforce needs. The Local Plan and Budget must clearly demonstrate how proposed uses of funds respond to CLNA findings, support continuous improvement, and advance equitable outcomes—particularly for special populations. This alignment ensures compliance with Perkins V requirements and promotes the strategic use of resources to strengthen CTE program effectiveness and student success.

Managing the Perkins V Basic Grant

Per the approved 2024–2027 North Carolina State Perkins Plan, Perkins V funds are designed to enhance CTE Programs of Study in curriculum programs, not continuing education programs. Perkins V must be focused on preparing students for "in-demand, high-skill, or high-wage industry sectors or occupations." Perkins V allows funds to be spent on emerging industries as local labor market needs are determined by the CLNA. The goal is to prepare the local workforce to positively impact the local community. All funds spent must be directly tied to a need determined by the CLNA.

NCCCS recommends that each college set up a Perkins Management Team to assist in oversight, planning, and implementation of the grant that includes, at a minimum:

- Perkins Program Coordinator—person identified to manage the Perkins Basic Grant
- Chief Academic Officer or designee
- CTE Deans or department leaders
- Chief Financial Officer or designee
- Chief Student Services Officer (recommended)

The Perkins Management Team will guide the Perkins Program Coordinator in the following activities:

- Review the current CLNA Summary Report to determine if a new needs assessment should be conducted based on local needs.
- Using the gaps identified in the current CLNA, collaboratively develop, write, and submit for approval the Local Application when up for renewal.
- Using the gaps identified in the current CLNA, collaboratively develop, write, and submit for approval the Local Plan.
- Ensure the Perkins Basic Grant Acceptance of Allotment and Assurances are signed and adhere with appropriate federal, state, and local laws and policies.
- Coordinate the implementation of grant-funded activities throughout the program year.
- Coordinate spending with all CTE Programs of Study.
- Prepare and submit modifications to the Local Plan and Budget as needed.
- Collaboratively develop, write, and submit the Mid-Year and End-of-Year Report.
- Collaboratively participate in any Monitoring and Compliance activities as assigned.

Perkins Basic Grant Annual Activities

Each college receiving Perkins V funds must designate a Perkins Program Coordinator who is responsible for ensuring timely compliance with all federal, state, and NCCCS requirements. The Perkins Program Coordinator serves as the primary point of contact for Perkins V administration and is accountable for coordinating required submissions, activities, and documentation throughout the program year.

The Perkins Program Coordinator must complete or coordinate the following activities each year:

- Submit a signed Allotment Acceptance and Statement of Assurances
- Submit and maintain Perkins Management Team contact information
- Develop and submit the Local Plan and Budget
- Submit job descriptions for all positions funded in whole or in part with Perkins funds, including extra duty or supplemental contract descriptions
- Attend and actively participate in Quarterly Perkins Virtual Meetings
- Develop and submit the 9–14 CTE Career Pathways
- Submit Locally Articulated Course List
- Attend and participate in the Perkins Fall Meeting
- Facilitate completion and submission of the Mid-Year Report and associated activities

- Submit XDBR reports as required
- Attend and participate in the Perkins Spring Meeting
- Facilitate completion and submission of the End-of-Year Report and associated activities
- Coordinate required documentation and support Monitoring and Compliance activities, as assigned

ONGOING COORDINATION AND OVERSIGHT

The Perkins Program Coordinator is responsible for coordinating implementation of activities outlined in the approved Local Plan and Budget and for managing any required revisions or modifications to plans, budgets, or supporting documentation. This includes ensuring changes are properly justified, documented, and submitted in accordance with NCCCS and Perkins V requirements.

Local Application

Per Section 134(a), the Local Application must be submitted for a college or consortium to be eligible for Perkins V funding. The Local Application shall cover the same period as the State Plan; currently July 1, 2024 through June 30, 2027. All 58 North Carolina Community Colleges have approved Local Applications through June 30, 2027; however, the Local Application may be updated based on the most recent approved CLNA. The Local Application must include at a minimum:

1. A summary of the process of how the CLNA was conducted.
2. How the college, with the local workforce board, workforce agencies, and other partners, will provide a series of career exploration and career guidance activities.
3. How the college will improve the academic and technical skills of students in CTE programs by strengthening the integration of academic and CTE components.
4. How colleges will provide activities to prepare CTE students and those identified as special populations for high-skill, high-wage, or in-demand occupations that will lead to self-sufficiency, prepare students for non-traditional fields, provide equal access for special populations to CTE courses, programs, and programs of study, to ensure that members of special populations are not discriminated against on the base of their status as members of special populations.
5. A description of the work-based learning opportunities that the college will provide to students participating in the CTE program and how the recipient will collaborate with employer representatives to develop or expand work-based learning opportunities for CTE students.
6. A description of how the college will provide students participating in CTE with the opportunity to gain postsecondary credit while still attending high school.
7. A description of how the college will work to support the recruitment, preparation, retention, and training including professional development of teachers, faculty, administrators, and specialized instructional support personnel.
8. A plan for continuous improvement that addresses disparities or gaps in student performance between plan years.

Programs of Study/Career Pathways

The North Carolina approved CTE Programs of Study are defined in the NCCCS Curriculum Standards. The following 10 curriculum programs are considered CTE programs:

15: Agriculture & Natural Resources Technologies
20: Biological & Chemical Technologies
25: Business Technologies
30: Commercial & Artistic Production Technologies
35: Construction Technologies
40: Engineering Technologies
45: Health Sciences
50: Industrial Technologies
55: Public Service Technologies
60: Transportation System Technologies

The Perkins Basic Grant must be used to improve and boost CTE 9–14 Programs of Study. If each CTE Programs of Study at the college receives a local supply budget, these local funds for supplies cannot be replaced with federal funds (supplanting). Funds to a particular program can be enhanced (supplement). Perkins V may be spent to supplement budgets used to outfit new programs and may be used for curriculum development of a new program.

NON-CREDIT AND CREDIT PATHWAYS

NCCCS is expanding opportunities for CTE-focused students to apply and transfer their earned credit:

- Institutions are encouraged to establish bilateral articulation agreements to promote continuous educational opportunities, usually focused on CTE programs. These agreements are between the colleges and their four-year institutional partners and may include a course-by-course transfer of credit, the transfer of an entire degree, or guaranteed admission programs.
- NCCCS curriculum alignment projects include representation from four-year partners to ensure the transfer and applicability of courses to relevant bachelor's degrees.
- Colleges can also crosswalk credit from Workforce Development to Curriculum, affording students the opportunity to earn credit through both content deliveries and applied towards their intended credential.
- All NC Community Colleges award Credit for Prior Learning, as defined in State Code Subchapter 800. Projects to expand this program, including offering more credit from industry credentials, apprenticeships, standardized exams, and military experience are underway.
- Courses offered within the Public Schools Units may also be articulated for credit. These courses include many of the general education courses needed to complete an associate degree and may also include CTE-related courses.
- Learn more on the Credit for Prior Learning Webpage.

Local Plan and Budget

Section 135 (a) states that "each eligible recipient that receives funds under this part shall use such funds to develop, coordinate, implement, or improve Career and Technical Education programs to meet the gaps identified in the comprehensive needs assessment described in section 134(c)."

The Local Plan and Budget is developed annually to describe both required Perkins V activities and any optional activities supported with Perkins Basic Grant funds or other allowable funding sources. All activities funded with Perkins V must be directly aligned to an identified gap or need documented in the Comprehensive Local Needs Assessment (CLNA).

The Local Plan and Budget must be reviewed and approved prior to the expenditure of any Perkins V funds. The Perkins Basic Grant funds must be used to develop, coordinate, implement, and improve CTE programs and Programs of Study in direct response to needs identified in the CLNA. Accordingly, each college's Perkins Basic Grant allocation must be clearly linked to its CLNA findings.

The Local Plan and Budget provides a detailed explanation of how the college will address Perkins V required activities and how each proposed activity responds to one or more identified CLNA needs. The plan also outlines proposed equipment purchases, salaries or wages for Perkins-funded personnel, and a general budget detailing all Perkins V–funded line items. Colleges must use the approved Local Plan and Budget Template and submit it annually for approval.

REQUIRED PERKINS V ACTIVITIES

Section 135 (b) outlined the following six required activities at each college receiving Perkins V funds. Colleges may use a combination of Perkins funds and/or other funds to conduct these activities.

1. Career exploration and career development activities through an organized systematic framework.
2. Professional development for CTE professionals.
3. Provide within CTE Programs of Study skills necessary to pursue high-skill, high-wage, or in-demand sectors or occupations.
4. Support integration of academic skills into CTE programs.
5. Plan to conduct elements that support the implementation of CTE programs and programs of study that result in increased student achievement.
6. Develop and implement an evaluation of the activities funded by Perkins.

LOCAL PLAN AND BUDGET ACTIVITIES

The Local Plan and Budget is developed using the Local Plan and Budget Template that links the activities, specific expenditures, Perkins-supported wages, and equipment that is linked across spreadsheets. Each activity must align to a specific CLNA section(s) or gap(s).

Colleges must have clearly defined and documented processes as part of their respective policy guidelines for planning and budgeting. The college's Perkins budget has 10 primary categories each with individual *Voc Code*. The six required uses of funds have been aligned to budget *Voc Codes* 10–16. There are four additional *Voc Codes* to allow for the permissible expenditures of equipment modernization, wages, and Career and Technical Student Organizations (CTSOs) activities.

Voc Code Definitions

Voc Code	Definition
10 Administration (section 135(d))	A college shall use not more than 5% of its allotment for administrative expenses. Administrative expenses are those activities necessary for the effective and efficient performance of the eligible college's duties under Perkins V, including the supervision of such activities. Any cost that supports the management of the Perkins V program is administrative. Examples of allowable administrative costs include, but are not limited to, salary costs associated with the development of the local plan. The college's administrative expenses are reduced by the Workforce Innovation and Opportunity Act (WIOA) sec. 121(h), which requires all required partner programs of the one-stop delivery system to contribute to the infrastructure costs of this system based on proportionate use and relative benefit received. These are non-personnel costs necessary for the general operation of the one-stop center, including rental of facilities; utilities and maintenance; equipment; and technology to facilitate access. The total allotment approved by the State Board will be reduced by this amount, therefore the infrastructure contribution should not be in the local plan and budget. Colleges must pay attention to the total amount they can budget for administration (Voc Code 10) as listed on the State Board item as "Admin Costs Available). It is important to note that administrative expenses may be used only in proportion to Perkins basic grant expenditures. For example, if after the first quarter, 25% of the grant has been spent, then 25% of the administrative funds may be billed to the grant (34 CFR 76.707).
11 Career Exploration and Career Development (section 135 (b)(1))	Provide career exploration and career development activities through an organized, systematic framework designed to aid students 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. Funds may be used for activities that: focus on career exploration and awareness; provide labor market information; assist in the development of graduation and career plans; support guidance /career counselors that provide information on postsecondary education and career options; expose students to industry needs or non-traditional fields; and any other activity that advances knowledge of career opportunities; and assists students in making informed decisions about education and employment goals.
12 Professional Development (section 135(b)(2))	Enhance professional development opportunities for CTE faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals. Funds *may* be used for activities that: support training on the implementation of strategies to improve student achievement and close gaps in student participation and performance; provide opportunities to advance knowledge, skills, and understanding in pedagogical practices; train on how to provide appropriate accommodations for individuals with disabilities and English language learners; provide advanced education and training leading to further credentials for faculty and staff that improve teaching and learning; and provide opportunities to advance knowledge, skills, and understanding of all aspects of an industry.
13 Skill Attainment (section 135(b)(3))	Resources ensure CTE includes the skills necessary to pursue careers in high-skill, high-wage, or in-demand industry sectors or occupations. Funds *may* be used for work-based learning opportunities; integration of employability skills; and other activities that increase student engagement and success including simulated work environments. Any equipment purchased for this purpose must be listed under Voc Code 17.

Voc Code	Definition
14 Academic Integration (section 135(b)(4))	*Interventions* support the integration of academic skills into Career and Technical Education programs and programs of study. Funds may be used for instructional technology equipment that expands the use of technology to enhance teaching such as distance learning. Funds may also be used to support tutors.
15 Increase Student Achievement (section 135(b)(5))	Funds used to plan and conduct elements that support the implementation of CTE programs and programs of study and that result in increasing student achievement of the local levels of performance established under section 113. Funds *may* be used for activities on curriculum alignment; collaborative relationships; accelerated learning programs; activities that increase student access to CTE programs; support for career and technical student organizations; support to reduce or eliminate out-of-pocket expenses for special populations participating in Career and Technical Education; other activities to improve Career and Technical Education programs.
16 Evaluation of CTE Programs (section 135(b)(6))	Resources must be utilized to develop and implement evaluations of the activities conducted with funds under this part, including evaluations necessary to complete the comprehensive local needs assessment.
17 Equipment (section 135(b)(5)(D))	Equipment includes tangible, non-consumable items with a useful life of more than one year that support Career and Technical Education programs and Programs of Study.
18 Wages & Salary for Faculty, Staff, and Other Supportive Personnel (not Administrative) (section 135(b)(5)(G))	Funds *may* be used for efforts to support salaries, recruit, and retain Career and Technical Education faculty, and staff, administrators, specialized instructional support personnel, career guidance, and academic counselors and paraprofessionals. Indicate which Voc Code activities each position is responsible for in the description.
19 Career and Technical Student Organizations (section 135(b)(5)(O))	Funds support career and technical student organizations. (It is recommended not more than 10% of allotment be used for this Voc Code) Funds *may* be used for CTE student preparation for, and participation in technical skills competitions aligned with Career and Technical Education or upgrade technical skills. Funds *may* be used to support CTE students and CTE students who are members of special populations as defined by Perkins V section 3(48) in all aspects of participation in Career and Technical Student Organizations including membership dues, uniforms, and other activities directly related to the CTSO that may present a financial barrier for participation. It is expected all other avenues of funding assistance will be exhausted before using Perkins funds for special populations assistance in CTSOs.
28 Reserve Fund and other Special Funding	Funds may be allocated to this Voc Code based upon a formula established by the State CTE Director and approved by the NCCC State Board. This includes Reserve Funds and special projects, except for leadership projects.

Colleges must establish accounts consistent with these categories so Perkins V funds can be properly identified and reported by the NCCCS Finance and Finance Office. Expenses should be accounted for by category according to federal program guidelines and the NCCCS Chart of Accounts. Budgeted items must comply with the *Education Department General Administrative Regulations* (EDGAR).

Any activity in Voc Codes 17–19 is solely for tracking purposes, and it must be linked to an activity in one of the required uses Voc Codes 11–16. When describing activities in Voc Codes 11–16, please specify which Voc Code in 17–19 the expense corresponds to.

For example, to address a gap in career exploration activities from the CLNA, an activity providing career exploration by a career coach is stated in Voc Code 11. Although the funds are allocated to Voc Code 18 (Wages & Salary), the connection to the CLNA aligns to Voc Code 11. The description in Voc Code 18 should reference the career coach activity.

Planning Checklist

Each college should consider the following questions to determine if an activity is eligible for Perkins V funding:

1. Does the activity address a gap or need to be identified by CLNA?
   - Perkins funds must also address an identified gap in the CLNA.
2. Does the activity address a Core Indicator or Performance area that is deficient?
   - Colleges on an improvement plan must outline activities and allocate funding to address any core indicator deficiencies. Other college funding sources instead of Perkins funds or combine Perkins funding with other college funding may be used to address deficiencies, as long as the combination of funds does not violate federal, state, or NCCCS guidelines.
3. Does this activity support the development of a new or expand existing CTE Programs of Study/pathway identified in the college's CLNA(s)?
   - Section 135(a) states that the recipient shall use "funds to develop, coordinate, implement, or improve Career and Technical Education programs to meet the needs identified in the comprehensive needs assessment…"
4. Does this activity address the one or more of the required uses" of Perkins V funds?
   - The college must address all required uses of funds with either Perkins or non-Perkins dollars. Voc Codes 11–16 are aligned to a required Perkins activity and must have at least one activity identified on the local plan. If the college is using Perkins funds, that activity must also address a gap identified in their CLNA(s).
5. Was the activity funded during the previous year by non-Perkins funds?
   - Perkins funds may not be used to take the place of local or state funding sources or continue activities funded by any state or local funds used in the previous year when those funds still exist. This would be supplanting, which is expressly prohibited by law. Additionally, if the activity is required, it would supplant the use of Perkins funds (Section 211(a)).
6. Are there gaps identified by data or other criteria to support the proposed activity in the CLNAs?
   - Perkins funds are used to address gaps and needs identified by data at the program level in their CLNAs.
7. Has the college reviewed its CLNAs with an equity lens to improve participation, persistence, and completion of special populations and underserved students?
8. How are activities planned to address equity and special populations?

ANNUAL BUDGET REVIEW AND APPROVAL PROCESS

The following general actions are taken for Local Plans and Budgets:

1. Colleges submit their annual Local Plan and Budget on the NCPerkins Grant Management System.
2. The assigned NCCCS Associate Director for Perkins Regional Services reviews for compliance with fiscal management policies and alignment of activities is justified by the current CLNA.
   a. Revisions may be required before approval request sent to next step.
3. The NCCCS Associate Vice President for Federal Programs reviews for compliance with fiscal management policies and alignment of activities is justified by the current CLNA.
   a. Revisions may be required before approval request sent to next step.
4. Colleges will receive the approved and signed Local Plan and Budget from their assigned NCCCS Associate Director for Perkins Regional Services and must start spending funds at the beginning of the program year.

LOCAL PLAN AND BUDGET MODIFICATIONS

In accordance with 2 CFR 200.308, a budget or program modification is required when a college proposes significant changes to its approved Perkins Local Plan and Budget.

A modification request is required if the proposed change exceeds 10% of the total approved budget or 10% of a specific vocational Voc Code or line item allotment, or if there is a significant change to the scope or objectives of the Local Plan.

All modification requests must demonstrate a clear and direct linkage to an identified gap or need in the CLNA. Colleges may not expend funds according to a modified plan or budget until written authorization has been granted. Early submission of modification requests is strongly encouraged to ensure that funds are expended in time to positively impact student learning outcomes.

All Local Plan and Budget modification requests must be submitted by May 15, 2027.

Modifications Requiring Prior Approval

Modifications are required under the following circumstances:

- A Voc Code or line item expenditure exceeds 10% of the approved amount
- There is a significant change to the approved Local Plan
- Equipment purchases not included in the approved plan are proposed
- All equipment purchases must be approved in advance by submitting a revised Local Plan and fully detailing the proposed equipment in the equipment tab

Budget Modification Requirements

All budget modifications must adhere to the following requirements:

- Cost Principles. All proposed changes must comply with the cost principles outlined in 2 CFR 200, Subpart E.
- Local Plan Documentation. When submitting a budget modification, the following is submitted to the NCPerkins Grant Management System:
    - A modified Local Plan and Budget signed by the Chief Financial Officer (CFO) and submitted as a scanned PDF
    - An updated Local Plan Excel workbook (four tabs), revised to reflect the proposed changes
- Colleges seeking to request modifications after May 15, 2027, must gain prior approval from their assigned NCCCS Associate Director for Perkins Regional Services.

Required Activities and Reports

The following activities and reports are required throughout the program year.

Fall Perkins Meeting

The Perkins Fall Meeting will provide professional development and a place to share best practices, allowing Perkins Program Coordinators to learn from each other. Each college is expected to present the promising practices they are implementing. The meeting will be held in early to mid-October.

Mid-Year Activities

Each January, the Perkins Program Coordinator must update the status of each activity in their Local Plan. The two furthest right columns in the workbook are for this purpose. The equipment list and wages tabs must also be updated. All the status updates must show activities planned and accomplished. These updates must be uploaded on the NCPerkins Grant Management System.

Spring Perkins Meeting

The Springs Perkins Meeting will be held in conjunction with the SkillsUSA North Carolina State Leadership Conference, usually in mid-April. The Meeting is a structured checkpoint to review progress, ensure compliance, and make timely adjustments to Perkins V implementation before the end of the program year.

End-of-Year Update

Each May, the Perkins Program Coordinator must complete the final status of each activity in their plan. Starting with the mid-year update, enter an updated status and explanation. The equipment and wages tabs should be reviewed and updated as needed.

Additionally, the Perkins Program Coordinator will submit a report answering the questions provided in early winter.

Fiscal Grant Management

Each recipient of Perkins funds must follow cost guidelines outlined in the Office of Management and Budget (OMB) publication of the final Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (known as the Uniform Grants Guidance), Perkins V, and EDGAR. These publications discuss how to determine if an expense is reasonable and allocable and include specific unallowable expense categories. Note that the state of North Carolina may set more stringent standards. These documents provide an explanation of the required documentation when salaries and personnel costs are paid with federal funds. *See Basic Cost Guidance/Principles* for details of allowable and unallowable costs (2 CFR 200.420).

Supplementing Versus Supplanting

Section 211(a) state funds made available under the Act must supplement and not supplant non-federal funds expended to conduct CTE activities. In other words, federal Perkins funds are to be used to enhance Career and Technical Education programs and activities and cannot be used when non-Perkins funds are available or have previously supported these CTE programs or activities.

1. It will be presumed that supplanting has occurred where:
    a. Colleges use Perkins funds to provide services that the college is required to make available under another federal, state, or local law.
    b. Colleges use Perkins funds to provide services that the college provided with non-Perkins funds in the prior year.
    c. Colleges provide services for non-CTE programs with non-federal funds and provide the same services to CTE programs using Perkins funds.
2. NCCCS recommends colleges incorporate a gap year between funding streams or provide documentation that the previous funding stream is no longer available.
3. NCCCS provides technical assistance and training on supplanting as needed. Colleges with questions or concerns regarding supplanting or any other Perkins matters should contact their assigned NCCCS Assistant Director for Perkins Regional Services.

NCCCS Spending Guidance

In addition to the statutory requirements, the NCCCS requires funds to be spread across programs and activities, such as salaries, equipment, work-based learning, and professional development within the guidance of the CLNA.

NCCCS recommends the following practical questions when spending Perkins V funds:

- Does it help fill a gap identified by the CLNA?
- Do I need this?
- Is the expense targeted to a valid programmatic/administrative need?
- Is this the minimum amount I need to spend to meet my needs?
- Do I have the capacity to use what I am purchasing?
- Did I pay a fair rate?
- If I were asked to defend this purchase, would I be able to?

Line-Item Specific Guidance

EQUIPMENT AND INSTRUCTIONAL RESOURCES VOC CODE GUIDANCE

To ensure consistency, compliance, and accurate reporting, colleges must correctly distinguish between equipment (Voc Code 17) and instructional resources (Voc Codes 12, 13, 15, and 16) when developing the Local Plan and Budget. Misclassification may result in audit findings, monitoring concerns, or required budget revisions.

Equipment Determination and Coding

Equipment includes tangible, non-consumable items with a useful life of more than one year that support Career and Technical Education programs and Programs of Study.

In accordance with North Carolina Statewide Accounting Policy 102.01 (Capitalization/Classification), equipment is defined using the *$10,000* per-unit acquisition cost threshold. In addition, items with a cost below *$10,000* must be classified as equipment when they are:

- Asset-tagged or inventoried in accordance with local policy.
- Considered high risk items due to portability or risk of loss (e.g., laptops, tablets, cameras, specialized technical tools).
- Classified by the college as equipment for tracking and accountability purposes.

Equipment purchases must reflect current industry standards, support instruction across multiple cohorts where applicable, and be aligned to gaps identified in the CLNA.

All equipment must be tracked, maintained, and used primarily to support CTE programs in accordance with local inventory procedures and federal property management requirements.

Use Voc Code 17 in the Local Plan and Budget when equipment meets the *$10,000* threshold or is asset-tagged, inventoried, or classified as a sensitive item, regardless of cost. Do not use Voc Code 17 for items that are not treated as equipment under local policy.

Colleges are responsible for maintaining documentation that supports classification decisions, including inventory practices, intended use, and alignment to approved activities.

Instructional Resources Determination and Coding

Instructional resources can be recorded in Voc Codes 12, 13, 15, or 16 in the Local Plan and Budget depending on the nature and use of the resource. Instructional resources are durable, non-consumable items that support teaching and learning but are not classified or tracked as equipment under state or local policy.

Instructional resources must be coded based on the primary purpose of the activity in the Local Plan and Budget. The same type of item may be coded differently depending on how it is used.

- **Voc Code 12: Professional Development**. Resources used to support professional development for CTE faculty, staff, administrators, counselors, or paraprofessionals. Examples may include training platforms, certification resources, and instructional improvement materials.
- **Voc Code 13: Skill Attainment.** Resources used directly by students to support technical skill development, instruction, and engagement in CTE programs. Examples may include student-use software, digital instructional platforms, and reusable instructional aids.
- **Voc Code 15: Increase Student Achievement.** Resources used as part of a planned strategy to support implementation of CTE programs and Programs of Study in a manner that improves student performance on local levels of performance. This code must be used when the activity is clearly tied to a defined strategy to improve student outcomes, not for general instructional use.
- **Voc Code 16: Evaluation of CTE Programs.** Resources used to support evaluation activities, including those necessary to complete or inform the CLNA or program effectiveness reviews.

Use Voc Codes 12, 13, 15, or 16 for instructional resources, based on the primary purpose of the activity, not the type of item. Ensure all items are durable and non-consumable and are directly aligned to CLNA-identified gap and program improvement.

Not Allowable

Perkins V funds must not be used for consumable materials or supplies that are depleted during instruction. Unallowable costs include, but are not limited to:

- General classroom or office supplies
- Materials consumed during instruction (e.g., welding rods, lumber, food ingredients)
- Disposable or short-life items

FACULTY POSITION SUPPORT

A college should generally not use Perkins V funds to support the same faculty position for more than three consecutive years. After this period, programs are expected to become self-supporting through institutional funding sources, including enrollment-generated FTE, to avoid supplanting and to ensure compliance with federal cost principles (2 CFR 200.308). All personnel costs charged to Perkins must be necessary, reasonable, allocable, and proportional to the benefit provided to the Perkins program, in accordance with the Uniform Guidance (2 CFR 200.403).

NON-FACULTY POSITION SUPPORT

Perkins V funds may be used to pay for non-faculty (non-FTE generating) positions if there continues to be a gap identified in their CLNA(s) that this position addresses. For example, Work-based Learning Coordinators, Career Coaches, and Program Navigators (2 CFR 200.430).

EXTRA DUTY PAY

Extra duty pay must be calculated on the institutional base salary for each unique contract, therefore, not everyone performing the same activity will be paid the same (2 CFR 200.430(h)(2)).

MINI GRANTS

Section 135 allows college to implement a mini-grant system, but any mini grant program must address a gap or need identified in the CLNA.

STUDENT CREDENTIALS

In accordance with Section 135 (b)(5)(S)), Perkins V funds may be used to pay for student credentials if the following criteria are met:

1. Industry has asked for students with this credential or training that this credential meets,
2. The credential addresses a gap identified in the CLNA, ***AND***
3. That the college only pays for a student once.

For example, if the student fails their credential attempt, then Perkins V funds may not be used to pay for additional attempts at certification or for renewal if their certification has expired.

FACULTY CREDENTIALS

According to Section 135 (2)(c)), Perkins V funds may be used to pay for faculty credentials if the CLNA identifies the credential is needed. Perkins may pay for the training for credentials, but not exam fees if they are not embedded into the cost of the training.

STUDENT OUT-OF-POCKET EXPENSES

Section 135(b)(5)(S) states that if student out-of-pocket expenses can be paid for by another funding source at by a community partner without undue burden, it will be expected that colleges will leverage the other funding sources first. For example, a college should first tap its state-funded Childcare Grant and refer students to the county Department of Social Services (Subsidized Childcare Program) before paying childcare expenses for CTE

students. Contact the assigned NCCCS Assistant Director for Perkins Regional Services to discuss Perkins V funds paying for short-term stop-gap funding while other sources are being pursued.

DONATED EQUIPMENT

If the college receives a donation of equipment, transportation and set up of said equipment may be paid for with the Perkins V funds and recorded in Voc Code 15.

PROFESSIONAL DEVELOPMENT EXPENSES

Paying for Professional Development Registrations Early

Registration costs are obligated when registration is confirmed, not when payment is made. For example, if a college registers for a conference in May for an event held in August, the cost is obligated in May and must be charged to the current Perkins V program year, which ends on June 30.

If a college registers in May but delays payment until August, it would be using July 1 funds to pay for a cost that was obligated in the prior award year, which is unallowable (34 CFR 75.707).

Colleges should not delay registration to avoid early payment, as doing so may result in losing a spot if the event reaches capacity. Therefore, the best practice is to register and pay in the current program year, even if the conference or event occurs in the following program year.

Cancellation Fees When Professional Development Is Canceled

If the original professional development travel or registration was legitimate and allowable, and a cancellation fee is charged as a normal and unavoidable part of doing business, Perkins V funds may generally be used to pay that fee.

A college would only be required to repay a cancellation fee with non-federal funds if:

- the original professional development activity was not allowable under Perkins V,
- the cancellation resulted from poor planning or negligence, **OR**
- the cost was avoidable or not reasonable.

Because most conferences and airlines charge standard, unavoidable fees for changing or canceling registrations or tickets, these fees are typically considered allowable incidental costs of the original obligation.

Receiving Airline or Registration Credits for Canceled Travel

Federal formula grant funds, including Perkins V, are subject to a 27-month period of availability under the Tydings Amendment. Costs must be obligated and provide benefit within that time period (34 CFR 75.707).

Although the obligation occurs at the time the original ticket or registration is purchased, any airline or registration credit received due to cancellation must be used in a way that:

- benefits the same Perkins grant, and
- occurs within the applicable period of availability.

For Program Year 2026 (July 1, 2026–September 30, 2027), the period of performance ends on September 30, 2028. Therefore, the college must use the airline or registration credit by that date to avoid audit risk or questioned costs.

If the college does not use the credit by the end of the grant's period of performance, the federal government will treat the original expenditure as not having provided benefit to the grant. While there is no monetary penalty, the college would be required to repay the cost using non-federal funds.

Career and Technical Student Organizations (CTSOs)

Section 135(b)(5)(O) states funds may be used to support student preparation for and participation in technical skills competitions through Career and Technical Student Organizations (CTSOs) aligned with curriculum CTE program.

A CTSO is an intracurricular, organized group established for students in CTE programs to further their knowledge and skills by participating in real world activities, events, and technical skills competitions. CTSOs enhance student learning through contextual instruction, leadership, personal development, applied learning, and real-world application.

CTSOs help guide students in developing a career path and provide opportunities in gaining the skills and abilities needed to be successful in those careers through CTSO activities, programs, and technical skills competitions. In addition, students have opportunities to hold leadership positions at the local, state, and national levels and attend leadership development conferences to network with other students and business and industry partners.

CRITERIA FOR RECOGNITION AS A CTSO IN NC

To be recognized as a CTSO in North Carolina, the following criteria must be met:

- CTSO must be recognized by the National Coordinating Council for Career and Technical Student Organizations (NCCCTSO) and must be a recognized, affiliated, or chartered member in good standing of the respective national CTSO organization.
- CTSO mission and statement of purpose must include:
    - Offering programs that are integral to industry or occupational focus that may be associated with a career pathways program, program of study or course, and
    - Serving CTE students and educators in one or more of the Career Clusters® identified in The National Career Clusters® Framework.
- CTSO governance reflects commitment to CTE as evidenced by:
    - incorporation as a 501(c)(3) not-for-profit corporation in the United States and the State of North Carolina,
    - organization by state geographic units, and
    - substantial representation on the board of directors from CTE educators and/oradministrators, including a member of the NCDPI or NCCCS, or a designee specified, serving the board in ex-officio, non-voting manner.
- CTSO engagement with CTE students, educators, and state department of education will be considered statewide in scope when:
    - student members are organized into chapters in middle, secondary, and/or postsecondary institutions,
    - there is a formalized process for election/selection of student leaders/officers at the local, state, and national levels, including a structured program of work,
    - there is an identified, participating, and employed Executive Director or equivalent, and
    - CTSO offers a minimum of 20 career development, leadership development, or technical skills competitive activities or competitions at the local/regional and state-level covering multiple disciplines.

CURRENTLY RECOGNIZED CTSOS IN NC

- FBLA Collegiate – Future Business Leaders of America Collegiate
- FCCLA – Family, Career and Community Leaders of America Postsecondary
- HOSA – Future Health Professionals
- National FFA Organization

- PAS – National Professional Agricultural Student Organization
- SkillsUSA – Technical, skilled and service students, including health

The following table outlines the permissible and not permissible expenditures for CTSOs with Perkins V funds.

Permissible	Not Permissible
• Travel for both students and faculty • Room and board at state or national leadership conference • Institutional student membership • Student membership if the student is in a special population as a last resort (college must document) • A closet of uniforms and equipment may be purchased and lent to students • *Consumable supplies for competitive events (mannequin heads, welding rods, lumber, electrical wiring, etc.)*	• Individual uniform items (blazers and slacks) • *Membership and competition event fees for students who have not obtained a high school diploma or certificate* • *Awards, trophies, and prizes* • *Banquets and recognition events* • *General CTSO promotional items* • *Costs unrelated to CTE skill attainment*

Perkins V funds may be used to support only those CTSOs formally recognized by NCCCS. As CTSOs are the only student organizations formally recognized as CTE co-curricular programs, only CTSO activities are recorded under Voc Code 19. Whereas student clubs aligned to CTE but not designated as CTSOs may be coded under another Voc Codes when the activities are clearly tied to addressing an identified gap in the CLNA, are instructional-based, and have a work-based learning component. Postsecondary Perkins V funds may only be used to support eligible postsecondary CTSO students and may not be expended on high school students, even when CTSO activities or events occur on a college campus.

While field trips to other conferences or competitions may be considered for Perkins V funding, such requests must be clearly justified by demonstrating how the activity directly contributes to increased technical skill attainment and addresses an identified gap or need documented in the CLNA. As a general practice, colleges are encouraged to exercise caution, and it is often appropriate to deny requests that do not clearly meet these criteria.

Consumable supplies for CTSO competitive events are allowable Perkins expenditures when directly related to CTE program improvement and approved in the Local Plan and Budget (Section 135(b). These supplies must be deemed necessary instructional materials used to prepare CTE students for CTSO competitive events that measure technical skill attainment and support the improvement of CTE programs of study.

Additionally, Perkins funds may not be used to supplant existing funding sources. If an activity, event, or trip has been funded in prior years using non-Perkins funds and those funds remain available, charging the expense to Perkins may constitute supplanting and is not allowable. Colleges should also be mindful that Student Life or other institutional funds may already be available to support student clubs or activities, and Perkins V funds should not replace those existing resources.

When considering new or expanded uses of Perkins V funds, ensure that the proposed expenditure represents a new or enhanced activity aligned to the CLNA and does not duplicate or replace other available funding sources. Colleges with questions regarding allowability, CTSO support, or supplanting concerns should contact their assigned NCCCS Assistant Director for Perkins Regional Services prior to incurring the expense.

DUAL ENROLLMENT STUDENTS

According to SkillsUSA, Inc. General Regulations, high school students who have not yet completed the requirements for a high school-level diploma must register for membership and compete as a high school student, even though they may also be enrolled in advanced placement or postsecondary courses.

Individual Student Support Using Perkins Basic Grant Funds Policy

In accordance with Section 135(b)(5)(S), a college may use Perkins V funds to provide individual student support for eligible students who are members of special populations. These supports must address documented barriers that may prevent a student's participation in, or completion of, CTE Programs of Study.

Examples of allowable individual student supports include, but are not limited to:

- Childcare assistance
- Transportation assistance
- Required tools, uniforms, or equipment
- Testing or certification fees
- Other short-term supports necessary to remove barriers to CTE participation

All students enrolled in Perkins V–eligible CTE programs at the college may request individual student support through Perkins V funds.

ELIGIBILITY CRITERIA

To qualify for childcare support, a student must meet the following criteria:

- Be actively enrolled in a Perkins V eligible CTE Program of Study.
- Belong to one or more special populations as defined by Section 3(48).
- Demonstrate an unmet need that creates a barrier to participation or completion in the CTE Program of Study.
- Demonstrate that other funding sources (e.g., state or local assistance, institutional resources, financial aid, or community programs) do not sufficiently cover the identified need.

PROCEDURE

1. Application Process
    a. Submission of Request: Students must complete an Individual Student Support Request Form identifying the specific barrier and requested support (e.g., childcare, transportation, required tools) and submit required documentation.
    b. Use of Existing Records: Staff will use institutional records to verify enrollment, financial aid status, special population status, and class schedules and program requirements.
2. Approval Process
    a. Staff Recommendation: Designated staff will review the request to confirm eligibility, assess the necessity of the support, and document non-supplanting considerations
    b. Final Approval: A designated administrator will review the recommendation and approve or deny the request in accordance with Perkins V requirements and institutional procedures.
3. Notification
    a. Students will be notified of the decision within 10 business days. Approved notifications will include type of support approved, duration of support, maximum funding amount, and any follow-up documentation required.
4. Disbursement of Funds
    a. Funds may be paid directly to a vendor or service provider (e.g., childcare provider, transportation vendor), ***or***

b. Reimbursed to the student upon submission of valid, itemized receipts, in accordance with college fiscal procedures.

Reassessment

1. Frequency: For ongoing or recurring individual student support, students must reaffirm their need by completing an updated attestation each academic term.
2. Staff Review: Staff will reassess continued program enrollment and eligibility, ongoing barrier and necessity of support, and lack of availability of alternative funding sources.

Supplanting Safeguards

To ensure compliance with Perkins V non-supplanting requirements:

- Perkins funds will be used only to address unmet needs not covered by other available resources.
- Staff will document all funding sources reviewed and the student's ineligibility for, or insufficiency of, those resources.
- If a student later receives alternative funding for the same expense, Perkins-funded support will be adjusted or discontinued, as appropriate.

Documentation and Recordkeeping

The college will maintain records for all requests, including:

- Completed Individual Student Support Request Form
- Supporting documentation (e.g., special population status, proof of expenses).
- Verification of non-supplanting determinations.
- Approval and disbursement records.

Records will be retained for a minimum of three years in compliance with federal and state requirements. The college will periodically review individual student support records to ensure compliance with federal requirements and institutional policies. Any discrepancies must be addressed promptly.

Compliance with EDGAR

The *Education Department General Administrative Regulations* (EDGAR) provide overarching administrative and fiscal rules that apply to most U.S. Department of Education grants, including Perkins V. While Perkins V sets the program-specific requirements, EDGAR governs the operational aspects of grant management. In practice, Perkins V determines what activities can be supported, while EDGAR dictates how those activities must be managed to ensure compliance. Where conflicts arise, Perkins V supersedes EDGAR, but in most cases the two frameworks operate together to guide responsible and compliant use of Perkins funds.

Specifically, EDGAR 34 CFR 75, 76, and 81 and Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) 2 CFR 200 and 3485 are referenced in this handbook. These regulations include but are not limited to such issues as application procedures, financial administration, property management, records retention, lobbying, and oversight. Colleges are subject to all applicable areas of the EDGAR.

MANDATORY DISCLOSURES

In accordance with 2 CFR 200.113, any applicant, recipient, and subrecipient must promptly disclose whenever it has credible evidence of the commission a violation of federal criminal law involving fraud, conflict of interest, bribery, or gratuity violations under Title 18 or Civil False Claims Act (31 U.S.C. 3729–3733). The disclosure must be made in writing to the Federal agency, the agency's Office of Inspector General, and pass-through entity (if

applicable). Recipients and subrecipients are also required to report matters related to recipient integrity and performance in accordance with Appendix XII of EDGAR.

DEBARRED AND SUSPENDED PARTIES

Grantees and sub-grantees must not make any award or permit any award (sub-grant or contract) at any tier to any party that is debarred or suspended or otherwise excluded from or ineligible for participation in federal assistance programs under 2 CFR §200.214, Government-wide debarment and suspension. Equipment monitoring may include reviewing purchases and evidence that the Federal System for Award Management (SAM) database was checked as well as the State of North Carolina debarment list NC Debarred Vendors | NC DOA, to ensure the vendor was not debarred or suspended. (2 CFR 180 and 2 CFR 200.213–214).

BASIC COST GUIDANCE/PRINCIPLES

Factors Affecting Allowability of Costs in 2 CFR 200.403 and 2 CFR 76.707 advise that all costs must be:

1. Necessary reasonable and allocable.
2. Conform with federal law and grant terms.
3. Consistent with state and local policies.
4. Consistently treated.
5. By Generally Accepted Accounting Principles (GAAP).
6. Not included as a match.
7. Adequately documented.

PROGRAM INCOME

Program income is gross income earned as a direct result of Perkins-supported activities during the period of performance. Consistent with 2 CFR § 200.307 and the U.S. Department of Education Grant Award Notification, recipients are permitted to use the addition method, which allows program income to be added to the federal award and used to further eligible CTE program objectives.

When income is generated from the sale of a product produced using materials purchased with Perkins V funds, NCCCS requires that such revenue be receipted back to the applicable Perkins V expenditure account as a refund of expense. Under no circumstances may income generated from Perkins-supported activities be deposited into a college's institutional funds or otherwise used for purposes unrelated to the CTE program.

Colleges must maintain records sufficient to identify the source, amount, accounting treatment, and use of all program income or recovered costs. Every effort should be made to identify and use such funds during the current grant period. When the final amount of income generated cannot be reasonably determined prior to June 30, colleges should account for the income and apply those funds to allowable CTE purposes as soon as practicable after the amount is determined.

Example

- *Perkins V funds purchase $500 of welding materials.*
- *Students fabricate a project that is sold for $200.*
- *The $200 must be receipted back to the Perkins expenditure account as a refund of expense.*
- *The net Perkins cost becomes $300.*

CONSTRUCTION PROJECTS

Capital improvements using Perkins V funding are typically unauthorized. Renovation to an existing structure for the installation of CTE training equipment may be permitted and requires written prior approval from the NCCCS Associate Vice President for Federal Programs (2 CFR 200.407 and 200.439).

1. Colleges are encouraged to earn income to defray program costs where appropriate. Income realized from CTE programs must be rolled back into the program from which it was earned, and not the college's general fund.
2. CTE program income includes income from fees for services performed, from the use or rental of real or personal property acquired with grant funds, and from the sale of commodities or items fabricated in the CTE program.
3. CTE program income does not include interest on grant funds, rebates, credits, discounts, refunds, etc., and interest earned on any of them. Taxes, special assessments, levies, fines, and other such revenues raised by a college are not program income.
4. There are no federal requirements governing the disposition of CTE program income earned after the end of the award period (i.e., until the ending date of the final financial report), unless the terms of the agreement or the federal agency regulations provide otherwise.
5. Live work procedures must be adhered to in support of CTE program income.
6. Accurate accounting of revenue, supplies, material, etc. must be maintained.

DIRECT COSTS

In accordance with 2 CFR 200.413, direct costs are those costs that can be identified specifically with a particular final cost objective, such as a federal award, or other internally or externally funded activity or that can be directly assigned to such activities easily with a high degree of accuracy. Direct costs include:

- Salaries and wages (including vacations, holidays, sick leave, and other excused absences of employees working specifically on objectives of a grant or contract – i.e., direct labor costs).
- Other employees fringe benefits allocable to direct-labor employees.
- Consultant services contracted to accomplish specific grant/contract objectives.
- Travel of employees.
- Materials, supplies, and equipment purchased directly for use on a specific grant or contract.

EMPLOYEES

The salaries of administrative and clerical staff should normally be treated as indirect costs. Direct charging of these costs may be appropriate only if all the following conditions are met:

- Administrative or clerical services are integral to a project or activity,
- Individuals involved can be specifically identified with the project or activity, AND
- The costs are also not recovered as indirect costs.

REASONABLE COSTS

In accordance with 2 CFR 200.404, reasonable cost consideration must be given to:

- Whether cost is a type recognized as ordinary and necessary for the operation of the college or the proper and efficient performance of the federal award.
- The restraints or requirements imposed by such factors as federal, state, local, tribal, and other laws and regulations and terms and conditions.
- Market prices for comparable goods and services in the geographic area.
- Whether the individuals acted with prudence under the circumstances considering their responsibility.
- No significant deviation from established prices.

ALLOCABLE COSTS

In accordance with 2 CFR 200.405, a cost is allocable to a federal award or cost objective if the goods or services involved are chargeable or assignable by relative benefits received.

The cost can only be charged in proportion to the value received by the program. For example, a college purchases a subscription to a course review process to evaluate all courses at the institution. The courses are

80% CTE curriculum and 20% continuing education, then 80% of the subscription can be funded with Perkins V funds.

NON-ALLOWABLE EXPENDITURES

Perkins V funds typically cannot be used to purchase the following expenditure:

- Alcohol
- Audits except single audit
- Awards and memorabilia
- Contingencies
- Contributions and donations
- Entertainment
- Equipment installation (unless included in acquisition cost)
- Expenses that supplant
- Facilities
- Fines and penalties
- Firearms*
- Food or beverages
- Fundraising
- Furniture
- Giveaways
- General administration apart from program administration
- Individual employee memberships
- Memberships or anything related to lobbying
- Student expenses or direct assistance to students, except for Perkins special populations
- Perkins cannot be used as matching funds for other grants

*Approval may be granted by the NCCCS Associate Vice President for Federal Programs for firearms required by the North Carolina Criminal Justice Education and Training Standards Commission for use in Basic Law Enforcement Training (BLET) courses, if the college is approved by the Commission to offer BLET and if the Bureau of Alcohol, Tobacco, Firearms, and Explosives (ATF) paperwork is complete.

SPECIFIC COST GUIDANCE BY CATEGORY

2 CFR 200.420–200.476 contains specific cost guidance by category and applies whether a cost is treated as direct or indirect. Failure to mention a particular item of cost in these sections of the CFR is not intended to imply that it is either allowable or non-unallowable; rather, the determination of allowability in each case will be based on the treatment or standards provided for similar or related items of cost.

2 CFR 200.420, “In case of a discrepancy between the provisions of a specific federal award and the provisions below, the federal award governs. Criteria outlined in 2 CFR 200.403 Factors Affecting Allowability of Costs must be applied in determining allowability. See also 2 CRF 200.102.”

TIMELY OBLIGATION OF FUNDS

Colleges must make a concerted effort to obligate Perkins V funds promptly throughout the program year. Priority must be made to obligate funding in a programmatic response toward improving student performance on the Core Indicators of Performance, especially in the performance areas that are reported below the targeted levels (2 CFR 200.305).

Colleges may begin to spend funds on July 1 once notified by their assigned NCCCS Assistant Director for Perkins Regional Services that their Local Plan and Budget have been approved.

Every effort should be made to spend Perkins V funds specifically on capital and non-capital purchases in the *first two quarters of the fiscal year* as it is critical to the efficient and effective use of funds to maximize the impact of the funds on student performance throughout the program year.

All equipment purchased using Perkins V funds must be *in place and used*, no later than June 30 of the program year.

If a college is starting a new CTE program in the summer or fall, and it has been approved by the SBCC, then Perkins V funds may be used to purchase equipment in advance of the program starting. While next program year's funding can be used to purchase the equipment before the start of classes, to use the funds in the current program year for the new CTE program starting in the summer or fall, the new CTE program must have been included on the current approved CLNA and these items must be purchased, received, and paid for in the current program year. If delivery of the equipment is delayed and caused to be paid for in the next program year, then the next program year's funds will have to cover the purchase.

Perkins V funds may not be used as the primary source for new program equipment, but to supplement the college's funding to start the new program.

REQUIRED CERTIFICATIONS

In accordance with 2 CFR 200.415 and to ensure expenditures are proper and in accordance with the terms and conditions of the federal award and approved project budgets, the annual and final fiscal reports or vouchers requesting payment under the agreements must include a certification, signed by an official who is authorized to legally bind the college, which reads as follows***:***

> *"I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729–3730 and 3801–3812.", false statements, false claims, or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729–3730 and 3801–3812)."*

Procurement Standards & Property Management

All colleges must follow 2 CFR 200.318–200.327 when procuring equipment for an approved CTE Program of Study.

Equipment must be used by the college in the CTE program or Program of Study for which it was acquired as long as needed, whether the CTE program or Program of Study continues to be supported by the federal award, and the college must not encumber the property without prior approval of NCCCS. When the equipment is no longer needed for the original program or project, the equipment may be used in other activities supported by the federal awarding agency, in the following order of priority:

1. Activities under a federal award from the federal awarding agency that funded the original CTE program or Perkins project, ***THEN***
2. Activities under federal awards from other federal awarding agencies. This includes consolidated equipment for information technology systems.

During the time that equipment is used on the CTE program or Program of Study for which it was acquired, the college must also make equipment available for use on other projects or programs currently or previously

supported by the federal government, provided that such use will not interfere with the work on the CTE program or Program of Study for which it was originally acquired. First preference for other use must be given to other programs or projects supported by a federal awarding agency that financed the equipment, and second preference must be given to programs or projects under federal awards from other federal awarding agencies. Use for non-federally funded programs or projects is also permissible. User fees should be considered if appropriate.

When acquiring replacement equipment, the college may use the equipment to be replaced as a trade-in or sell the property and use the proceeds to offset the cost of the replacement property.

Management

Procedures for managing equipment (including replacement equipment), whether acquired as a whole or in part under a federal award, until disposition takes place will, as a minimum, meet the following requirements (2 CFR 200.313):

1. Property records must be maintained that include a description of the property, a serial number or other identification number, the source of funding for the property, who holds title, the acquisition date, and cost of the property, the percentage of federal participation in the project costs for the federal award under which the property was acquired, the location, use and condition of the property, and any ultimate disposition data including the date of disposal and sale price of the property.
2. All items susceptible to pilferage purchased with Perkins V funds must be inventoried and visibly tagged (or alternate method of identification) before being placed into service. Colleges must have a high-risk equipment policy and procedure.
    a. At a minimum, tags will identify the item as purchased with Perkins funds and include an inventory number that corresponds with property records.
    b. Property records must include a description of the property, a serial number or other identification number, the source of property, who holds title, the acquisition date, and cost of the property, the percentage of federal participation in the cost of the property, the location, use and condition of the property and any ultimate disposition data including the date of disposal or sale price of the property.
3. A physical inventory of the property must be taken, and the results reconciled with the property records at least annually.
4. A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft must be investigated.
5. Adequate maintenance procedures must be developed to keep the property in good condition.
6. If the college is authorized or required to sell the property, proper sales procedures must be established to ensure the highest possible return. Consult the assigned Assistant Director for Perkins Regional Services before selling.
7. Colleges must take reasonable precautions to ensure that items purchased with Perkins V funding are properly maintained, accounted for, and protected from damage, loss, unreasonable deterioration, and theft. Colleges are advised to implement the following controls, and any additional controls felt to be necessary to safeguard the property:
    a. Maintain adequate and current property records that allow the items to be located and maintain records of the person or persons who have property in their possession or are responsible for their security during non-duty hours. Accountability and responsibility must always be maintained, whether the property is located onsite or offsite.
    b. Provide a secure building and coordinate between the security function and the Property Control Officer, especially regarding security violations or changes affecting official property.
    c. Have a written policy and always follow it when checking out property that requires employees to sign for property in their possession.

When property acquired with Perkins V funds is lost, damaged, or stolen the college must conduct and fully document an investigation. When appropriate, law enforcement authorities should be notified, a police report should be filed and maintained for records, and if the item meets the state's capitalization threshold, the insurance provider should be notified. *The college must notify NCCCS if any property acquired with Perkins V funds is lost, stolen, or damaged beyond repair.*

Disposition

When original or replacement equipment acquired under a federal award is no longer needed for the original project or program or for other activities currently or previously supported by a federal awarding agency, except as otherwise provided in federal statutes, regulations, or federal awarding agency disposition instructions, the college must request disposition instructions from NCCCS. Disposition of the equipment will be made as follows, in accordance with federal awarding agency disposition instructions:

1. Items of equipment with a current-per-unit fair market value of *$10,000* or less may be retained, sold, *sold to surplus*, or otherwise disposed of with no further obligation to the federal awarding agency.
2. Except as provided in 2 CFR 200.312 federally owned and exempt property, paragraph (b), or if the federal awarding agency fails to provide requested disposition instructions within 120 days, items of equipment with a current per-unit-fair-market value over *$10,000* may be retained by the college or sold. The federal awarding agency is entitled to an amount calculated by multiplying the current market value or proceeds from sale by the federal awarding agency's percentage of participation in the cost of the original purchase. If the equipment is sold, the federal awarding agency may permit the college to deduct and retain from the federal share *$1,000* or 10% of the proceeds, whichever is less, for its selling and handling expenses.
3. The college may transfer the title of the property to the federal *g*overnment or to an eligible third party provided that, in such cases, the college must be entitled to compensation for its attributable percentage of the current fair market value of the property.
4. In cases where a college fails to take appropriate disposition actions, the federal awarding agency may direct the college to take disposition actions.

Perkins V Monitoring and Compliance

Sections 121(a)(1) and 123(b) requires NCCCS to conduct monitoring and compliance activities to ensure the colleges receiving Perkins V funds are administering the grant as authorized and in compliance with federal and state requirements. Technical assistance will be provided where requested or required. NCCCS performs comprehensive and continuous monitoring based on risk for noncompliance with federal statutes, regulations, and the terms and conditions of the sub-award of Perkins V.

Additional monitoring requirements may be indicated due to updates or changes to federal monitoring and reporting requirements. Colleges will be notified of these updates promptly to facilitate accurate monitoring.

Federal Programs Monitoring Protocols

Monitoring and compliance activities will be conducted in accordance with the 2026–2027 Federal Programs Monitoring Protocols.

Risk Assessment

A Risk Assessment for of all subgrantees will be performed by the NCCCS Federal Programs Monitoring and Compliance team on an annual basis prior to disbursement of the Perkins Basic Grant funds. The purpose of this assessment is to furnish NCCCS with information that will help in monitoring potential risk factors associated with grants awarded to providers.

The focus of the Risk Assessment is to ensure that colleges adhere to the grantor's guidelines and agreements, remain within the budget, can implement the scope of service, and ensure that proper internal controls are in place. Risk factors will include, but will not be limited to:

- Previous Single Audit Findings
- New Perkins Program Coordinator (1 year or less)
- Required meeting attendance
- Student Performance
- Size and complexity of CTE program
- Data submission errors
- Timely reporting and submission of documents
- Large allocation amount (more than $500,000)
- Timely obligation of funds
- Using funds for individual student support
- Lapsed funds/carryover amounts
- Indications of fraud and abuse
- Effectiveness of grant management processes and team
- Impending CTE program closure

Colleges, as subrecipients of federal grant funds, must meet specific compliance measures as conditions for the grant awards or become at risk for noncompliance. Upon completion of the risk assessment, all colleges will be classified as high, moderate, or low risk. Each level of risk will have various levels of programmatic and fiscal monitoring that will be implemented during the program year.

Technical Assistance and training will be provided during the program year to help mitigate and alleviate some of the factors that constitute as risk.

Comprehensive Monitoring

Comprehensive monitoring protocols are divided into seven modules based on Perkins V Section 134 (C)(1) and 2 CFR 200.332(d). All colleges will receive at least one virtual or onsite comprehensive monitoring visit from program years 2025–2029.

In addition to ensuring colleges are in compliance with applicable federal and state statutes, regulations, and policies, comprehensive monitoring visit will seek to determine how the college is making a difference in student achievement by addressing key elements in the CLNA. The monitoring will review the areas of student performance; CTE program size, scope, and quality; progress in implementing and enhancing a Programs of Study; and career pathways with high-skill, high-wage, or in-demand occupations aligned to the labor market; faculty professional development including recruitment, retention, and placement; and equal access to high-quality CTE Programs of Study for all students.

Interviews with faculty and staff will be conducted to determine activities and strategies the college has implemented with the use of Perkins and local college funds to assist faculty in developing new skills and credentials to enhance Career and Technical Education at the college. Interviews will take place with CTE Deans or vice presidents to learn of progress in collaborating with secondary partners to outline and implement career pathways that are documented on a variety of matrices. Finally, interviews with the Perkins Grants Manager or institutional effectiveness officer will be conducted to better understand the college's annual negotiated levels of performance.

CORRECTIVE ACTION PLAN

Upon completion of the comprehensive monitoring visit, a Corrective Action Plan (CAP) may be required to resolve any out of compliance areas identified during the monitoring visit. The college will be required to submit a plan detailing how the out of compliance programmatic and/or fiscal practices will be amended within a required time frame. If there are unresolved CAP(s), further action may be taken to include specific award conditions/restrictions. If the college is placed on a Corrective Action Plan (CAP), the college will have 30 business days to respond in writing

Continuous Monitoring

Continuous monitoring is based on areas identified by national trends as high risk, that currently include annual budget tracking, time and effort records for employees, and the purchase of equipment.

BUDGET MONITORING

The Local Plan and Budget will be monitored through the submission of XDBRs. Colleges are required to submit XDBR financial documentation, which displays monthly expenditures and program activities, in January, April, and July of each program year.

EMPLOYEE TIME AND EFFORT

Time and effort reporting guidelines are specified in 2 CFR Part 200.430. All employees, including instructors, administrators, and other staff who are paid in part or in whole with federal funds are required to document the time and effort they spend within that program. The portion of the federally paid wages should be reflective of the time and effort the individual has put forth for that Federal program. Charges to federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:

- Be supported by a system of internal control that provides reasonable assurance that the charges are accurate, allowable, and properly allocated.
- Be incorporated into the official records of the organization.
- *Documents the employee's time in writing.*
- *Reflects the actual time spent by the employee on activities for the federal program(s) being charged.*

- *Covers either a monthly or semi-annual period.*
- *Accounts for all the employees' time for the period covered.*
- *Is signed by the employee and supervisory official having firsthand knowledge of the work performed by the employee.*
- *Is maintained onsite to prepare Time and Effort Reports, which are to be submitted to NCCCS.*
- *Documents activities performed after-the-fact.*

Employees compensated using Perkins V funds are required to maintain auditable time-and-effort documentation that shows how each employee spent his or her compensated time. Such documentation is written after the fact, documenting how the time was actually spent (not estimated or budgeted). There are sample forms *on the NCCCS Federal Programs Monitoring and Compliance webpage*.. There are *two* types of time and effort certification reports:

1. *An employee for whom salary and wages are charged to multiple cost objectives (e.g., funded by multiple grants or by a combination of Perkins V and institutional funds) must document and report time and effort through a monthly certification that is submitted by the 15th of each month.*
2. *An employee for whom salary and wages are charged to a single cost objective (e.g., funded fully by a single federal grant) may document and report time and effort through a semiannual certification that is completed every six months.*

When are Time and Effort Reports Submitted to NCCCS?

Employees will complete either a semi-annual (every six months) or monthly Time and Effort Report, based on whether their salaries and wages are charged to single or multiple cost objectives. Monthly reports are due by the 15th of the month following the reporting period. Semi-annual reports must be submitted by the 15th of the month in January and again in July.

Documentation should be collected monthly and be included with the time and effort form. Supervisors should reconcile the hours worked with the documentation provided to ensure the hours reported match. Do not include student personal identifying information in any reports submitted to NCCCS.

EQUIPMENT MONITORING

To ensure compliance with 2 CFR 200.439 regarding equipment and capital expenditures, a robust equipment tracking system must be implemented that effectively tracks the purchase, location, and disposal of all equipment acquired with federal Perkins Funds. Any college spending over 65% of the Perkins V Basic Grant in a given program year on equipment will be monitored.

Glossary

A

Academic Integration (Section 135(b)(4))
The deliberate combination of academic content with career and technical education (CTE) to enrich student learning, improve achievement outcomes, and prepare students comprehensively for postsecondary education and employment.

Administration (2 CFR 200.413)
Non-instructional activities necessary for effectively managing and supervising Perkins-funded projects, including grant oversight, financial management, and administrative coordination. These tasks exclude direct instructional activities, curriculum development, or professional development.

Allocable Costs *(2 CFR 200.405)*
Expenses directly assignable to a specific Perkins-funded project or activity based on the relative benefit received. Allocable costs must be directly related, proportional, and clearly documented to demonstrate their necessity and benefit to the funded activity.

Allotment Acceptance (Section 113(a)–(b))
The official process by which a state or eligible local recipient formally accepts its allocated Perkins V federal funds. Acceptance includes commitments to adhere strictly to federal requirements, including reporting obligations, accountability standards, and equitable program access.

Apprenticeship (29 U.S.C. §50)
A structured work-based training model combining paid on-the-job learning supervised by skilled mentors with related classroom instruction. Apprenticeships lead directly to mastery of occupational skills, recognized industry credentials, and long-term employment opportunities.

Approved CTE Pathway (Section 3(8))
A coordinated, state-approved sequence of rigorous academic and career-focused courses designed to guide students clearly and intentionally toward specific educational credentials or targeted career goals. Pathways must align with regional workforce demands and provide opportunities for credential attainment.

Articulation Agreements (High School to College) (Section 3(4))
Formal agreements between high schools and postsecondary institutions specifying credit transferability and alignment of courses. These agreements allow high school students to earn dual credit or advanced standing in college-level CTE courses, streamlining their transition to postsecondary education.

Assurances (Section 122(c))
Legally binding commitments from states and local recipients affirming compliance with Perkins V requirements. These assurances guarantee proper program implementation, non-discrimination, equitable student access, stakeholder engagement, data accuracy, accountability, and responsible fund use.

Assistive Technology Device (20 U.S.C. Chapter 33, Section 1401(1))
Any item, equipment, or product system (commercially available, modified, or customized) that enhances or maintains the functional capabilities of individuals with disabilities, supporting equitable access and participation in educational settings and CTE programs.

Associate in Arts (AA) (NCCCS)
A postsecondary degree typically requiring 60–61 semester hours of general education and college-transfer courses designed to prepare students for transfer to four-year institutions. The AA degree emphasizes broad academic foundations and transferable credit.

Associate in Applied Science (AAS) (NCCCS)
A career-focused degree typically requiring 64–76 semester hours of coursework, blending technical skills, specialized occupational knowledge, and general education. The AAS degree prepares students directly for entry-level employment in specific technical fields.

At-Risk (Section 3(48), ESSA 20 U.S.C. 6472)
Refers to students who demonstrate characteristics that statistically correlate with lower academic achievement, graduation rates, or workforce readiness. This includes students from economically disadvantaged backgrounds, students with disabilities, first-generation college students, English learners, foster care youth, and others identified within Perkins V's defined special populations.

B

Basic Grant (Section 131 and 132)
Federal formula-based funding provided under Perkins V to eligible local educational agencies, institutions, or consortia. These funds support improvement, innovation, and expansion of high-quality career and technical education (CTE) programs that align with regional workforce needs, local economic priorities, and student career aspirations.

BILT Model (Business and Industry Leadership Team) (Section 134(d)(5))
A collaborative engagement model where industry representatives regularly provide direct input into the development and ongoing revision of educational programs. The BILT model ensures curricula, training, and credentials stay closely aligned with current and future industry needs, enhancing student employability and workforce relevance.

Bureau of Indian Affairs (BIA) (25 CFR 32; Section 116(g))
A federal agency within the U.S. Department of the Interior responsible for overseeing and supporting education programs, including CTE, for Native American tribes and tribal organizations. The BIA collaborates with eligible entities under Perkins V to improve the availability, quality, and effectiveness of career and technical education opportunities for Native American students.

Business/CTE Program Advisory Council (Section 134(d)(5))
A representative group of industry professionals, local business leaders, educators, students, and other key stakeholders who regularly convene to provide strategic guidance, feedback, and recommendations for local CTE programs. Advisory councils ensure that programs meet industry standards, anticipate labor market demands, and effectively prepare students for employment or continued education in high-skill, high-demand sectors.

C

Career and College Promise (CCP) (NC G.S. 115D-20(4))
A North Carolina state program enabling eligible high school students to earn tuition-free college credits toward certifications, diplomas, or degrees. CCP facilitates seamless transitions to postsecondary education and employment through structured dual-enrollment pathways.

Career and Technical Education (CTE) (Section 3(5))
Organized educational activities providing rigorous academic and technical training, preparing students for high-skill, high-wage, and in-demand careers or advanced educational opportunities.

Career Clusters® Framework (Advance CTE)
Nationally recognized groupings of occupations and industries organized around common skill sets and knowledge, designed to help students explore career options and identify the educational pathways necessary for their chosen career fields.

Career Exploration and Career Development (Section 135(b)(1))
Programs and activities intended to build student awareness of career options and develop decision-making skills, facilitating informed career planning and preparation for further education and employment.

Career Guidance and Counseling (Section 135(b)(1))
Services and programs designed to assist individuals in making informed decisions about career pathways, including academic advising, individualized planning, career assessments, and support transitioning into postsecondary education or employment.

Career Pathways (Section 3(8))
Structured, non-duplicative sequences of educational coursework and training opportunities that clearly connect education and workforce experiences, enabling individuals to attain credentials, secure employment, and advance within career fields.

Career Pathway Bridge (WIOA 29 U.S.C. 3102)
An educational "on-ramp" combining basic skills instruction (such as literacy and numeracy) with occupational training, enabling students to advance into higher-level CTE programs, attain credentials, and enter career pathways aligned with labor market demand.

Career Prep (NC Perkins Handbook)
Programs and activities specifically designed to support CTE students transitioning successfully from high school into postsecondary education, employment, or apprenticeships, including career readiness training, certifications, and work-based learning opportunities.

Career Specialty (NC Perkins Handbook)
Focused instructional pathways designed around industry standards, providing specialized training to prepare students for specific credentials, certifications, or occupations that meet identified industry and labor market requirements.

Case Management (NC Perkins Handbook)
A structured approach involving coordinated support and oversight of student activities, interventions, and outcomes. Effective case management ensures Perkins-funded programs meet accountability standards, performance measures, and student success goals.

Carryforward Funds (2 CFR 200.403 & 200.308)
Perkins V funds remaining unexpended at the end of a program year that, with appropriate approval, may be reallocated and spent in the subsequent program year to support ongoing or expanded grant objectives.

Certificate (NCCCS)
A short-term educational credential program typically consisting of 12–18 semester credit hours, providing focused skill development aimed at immediate employment opportunities or advancement within a career field.

Chief Academic Officer (CAO) (NCCC)
The senior administrator responsible for curriculum and academic affairs within North Carolina community colleges, overseeing program quality, accreditation compliance, faculty qualifications, and instructional standards.

Classification of Instructional Programs (CIP) Codes (IPEDS)
A standardized, nationally recognized coding system used to categorize and report instructional programs for purposes such as program tracking, data analysis, funding allocation, and accountability reporting under Perkins V.

Clinical Practice (NC Perkins Handbook)
Structured, supervised practical experiences within healthcare settings, providing health science students hands-on learning aligned with industry standards, enhancing professional competence, and preparing them for healthcare careers.

Colleague (NCCCS)
An enterprise software solution used by the North Carolina Community College System, integrating administrative functions such as student records, finance, human resources, and grant management, including Perkins V funding activities.

College Information System (CIS) (NCCCS)
Integrated data systems, including Colleague and the NCCCS Data Warehouse, that support college operations, data reporting, student information management, and analysis critical for Perkins V compliance and accountability.

College Transfer Pathway (CTP) (NC G.S. 115D-20(4))
Curriculum pathways composed of transferable academic courses allowing high school students to simultaneously earn credits toward a high school diploma and college degree, facilitating smooth transfer to four-year institutions.

Combined Course Library (CCL) (NCCCS)
A standardized, statewide database detailing course descriptions, competencies, and credits for curriculum courses approved for use by North Carolina community colleges, promoting consistency and facilitating transferability.

Comprehensive Articulation Agreement (CAA) (NC G.S. 116-11)
A statewide agreement ensuring the seamless transfer of credits earned at North Carolina community colleges to institutions within the University of North Carolina System, streamlining degree completion.

Comprehensive Local Needs Assessment (CLNA) (Section 134(c))
A mandatory, data-driven evaluation process required by Perkins V, conducted by local recipients to identify programmatic strengths, gaps, workforce alignment, equity issues, and strategic priorities in local CTE offerings.

Concentrator (Section 3(12))
A student who has completed substantial coursework within a specific CTE program, defined federally as having earned at least 12 postsecondary credits or completion of a shorter program, positioning the student for credential attainment and employment.

Core Indicators of Performance (Section 113(b))
Federally required metrics used to evaluate CTE program effectiveness and student outcomes, including graduation rates, academic achievement, credential attainment, employment placement, and participation of special populations.

Credential Attainment Rate (Section 113(b)(2)(A))
The percentage of CTE concentrators who successfully earn recognized postsecondary credentials (e.g., certificates, licenses, degrees) within a defined timeframe, serving as a key Perkins accountability measure.

D

Data Warehouse (NCCCS)
A centralized database system that securely stores a rolling five-year period of raw educational and performance data. This repository facilitates comprehensive reporting, data analysis, and informed decision-making to ensure compliance with Perkins V accountability measures and continuous program improvement.

Debarred and Suspended Parties (2 CFR 180; 2 CFR 200.214)
Entities or individuals prohibited from receiving federal Perkins V grant funds due to violations, including fraud, unethical practices, non-compliance with federal regulations, or misuse of federal funding. The exclusion helps maintain program integrity, transparency, and accountability in grant administration.

Diploma (NCCCS)
A structured educational program requiring 36-48 semester hours that combines focused technical training with foundational general education coursework. Diploma programs prepare students directly for entry-level employment or serve as a stepping-stone toward further educational attainment in specialized fields.

Direct Costs (2 CFR 200.413)
Costs that can be explicitly identified with a specific Perkins V-funded activity, program, or project, such as salaries of instructional personnel, equipment, materials, or supplies used solely for the funded program. Direct costs must be necessary, reasonable, allocable, and clearly documented.

Disability Services (Americans with Disabilities Act (ADA), Section 504 of the Rehabilitation Act)
Supportive services, accommodations, and adaptive technologies provided to students with disabilities to ensure equal access, participation, and opportunities for academic and technical success in educational programs under federal civil rights protections.

Distance Learning (Section 135(b)(5)(K))
Educational courses or programs delivered through remote, technology-based instruction methods rather than traditional face-to-face classroom interactions. Distance learning may utilize online platforms, video conferencing, or interactive simulations to expand access, equity, and flexibility for diverse student populations.

Dual Enrollment (Section 3(15))
Programs allowing eligible high school students to enroll simultaneously in college-level courses and receive dual credit (high school and college). Dual enrollment programs support accelerated learning, reduce college costs, and create seamless transitions to postsecondary education.

E

Eligible Recipient (Section 3(21))
Entities authorized to receive Perkins V funding, including local educational agencies (LEAs), public or nonprofit private postsecondary institutions, technical education centers, area CTE schools, educational service agencies, tribal organizations, or consortia meeting specific federal eligibility criteria and demonstrating capacity to deliver compliant, high-quality CTE programs.

Employer Engagement (Section 134(d)(5))
The deliberate involvement of business and industry partners in guiding and supporting career and technical education programs. Engagement includes serving on advisory councils, providing internship and apprenticeship placements, aligning curriculum with workforce needs, and validating industry-recognized credentials to enhance student readiness for employment.

English Language Learning (ELL) (Section 3(22), ESSA, Section 8101(20))

Educational programs and services designed to develop proficiency in the English language for non-native speakers, enabling successful participation in career and technical education programs, advancement into postsecondary education, and employment readiness. Perkins V specifically highlights support for ELL students within special populations.

Equipment (2 CFR 200.313)
Tangible, non-expendable property essential for implementing Perkins V-funded programs, characterized by a useful lifespan exceeding one year and typically a cost exceeding a defined capitalization threshold. The North Carolina Office of the State Controller set the threshold at items greater than *$10,000* per unit (GASB Codification Section 1400). Equipment purchases must align with approved grant activities, directly supporting instructional delivery and student skill development.

Equity Gap Analysis (Section 134(c)(2)(E))
A systematic examination conducted as part of the Comprehensive Local Needs Assessment (CLNA) to identify disparities in access, participation, and outcomes in CTE programs among special populations and historically underserved student groups. The analysis guides targeted interventions and resource allocation to reduce equity gaps.

ESSA Act (Every Student Succeeds Act) (Public Law 114-95)
A federal education law that governs K–12 public education policy, focusing on accountability, equity, and support for historically underserved students. ESSA intersects with Perkins V through provisions ensuring coordinated efforts to support college and career readiness, particularly through aligned accountability systems and equitable resource allocation.

Equity (Section 3(48), Section 134 (c)(2)(E))
The principle of providing equitable access, resources, and opportunities in CTE programs, intentionally designed to address barriers faced by special populations, including those from economically disadvantaged backgrounds, students with disabilities, English learners, and other groups historically underserved in education and workforce training.

ESSA and Perkins V Alignment (Sections 1111 and 122)
Strategic coordination required under federal law between ESSA and Perkins V programs to ensure coherent educational accountability measures, effective transition support, and consistent alignment between academic standards and technical skill development.

Every Student Succeeds Act (ESSA) (U.S.C. 114-95)
Federal legislation designed to enhance educational equity, accountability, and quality in elementary and secondary education. ESSA encourages alignment with career and technical education under Perkins V, especially in accountability measures, career readiness, and support for diverse student populations.

Extra-Duty Contracts/Pay
Compensation for additional work beyond regular duties, often related to grant-funded activities.

F

Faculty Credentials (SACSCOC Guidelines; NCCCS)
Minimum qualifications, including degrees, certifications, licensure, and relevant professional experience, required by accrediting bodies and state regulatory agencies for faculty members teaching specific academic or career and technical education (CTE) courses. These credentials ensure quality instruction and compliance with accreditation standards.

Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. 1232g; 34 CFR 99)
A federal law protecting the privacy and confidentiality of student education records. FERPA governs access, disclosure, and the safeguarding of student information, requiring informed consent from students (or parents, if minors) for data sharing, except under specifically outlined conditions. Compliance with FERPA is mandatory for recipients of federal education funds, including Perkins V grant recipients.

Formula Grants (Sections 112–113)
Federal grants allocated to eligible states, local educational agencies (LEAs), and institutions based on predetermined statutory formulas using factors such as population demographics, economic indicators, and educational need. Perkins V funds are primarily distributed as formula grants, ensuring proportional, equitable allocation across recipients.

Formula Allocation (Section 131–132)
The method used to distribute Perkins V funds to states and eligible recipients based on established criteria, such as census data, enrollment statistics, and economic need, ensuring fair and transparent funding distribution aligned with local conditions and priorities.

Full-Time Equivalent (FTE) (NCCCS)
A standardized unit for measuring student enrollment, faculty workload, or staff employment. FTE calculations convert part-time student or employee involvement into equivalent full-time units, facilitating consistent state and federal reporting, budgeting, and funding allocation.

G

Gap Analysis (Section 134(c)(2))
A structured, evidence-based process within the Comprehensive Local Needs Assessment (CLNA), designed to systematically identify disparities between existing career and technical education (CTE) programs and regional labor market demands, student performance outcomes, and equitable access for special populations. The results guide strategic decisions, prioritization, and resource allocation for program improvement.

H

High-skill Program (NC Perkins Handbook)
Programs designed to prepare students through advanced postsecondary training and education, often requiring specialized technical instruction beyond high school, culminating in industry-recognized credentials, associate degrees, or advanced certifications necessary for employment in technical or skilled occupations.

High-wage Program (NC Perkins Handbook)
CTE programs targeting occupations paying wages at or above the median income for the relevant region or state. These programs align with Perkins V objectives to support students in securing stable, economically sustainable careers.

Homeless Individuals (Section 3(48)(G); McKinney-Vento Act)
Individuals who lack a fixed, regular, and adequate nighttime residence. Perkins V requires targeted support for homeless students to ensure equitable access and successful participation in CTE programs.

I

In-demand Industry Sector or Occupations (Section 3(26), WIOA 29 U.S.C. 3102)
An in-demand industry sector or occupation is defined as one with a substantial current or potential impact on state, regional, or local economies, offering high growth, stability, and jobs leading to economic self-sufficiency.

Individuals Out of the Workforce (Section 3(48)(E))
Individuals who have been unemployed or underemployed, including displaced homemakers who have previously managed households without compensation and who now face the need for employment skills and training. Perkins V prioritizes supportive programming to help these individuals return to or advance within the workforce.

Individuals with Disabilities (Section 3(48)(A); Americans with Disabilities Act; Section 504 Rehabilitation Act)
People who have physical or mental impairments that substantially limit one or more major life activities, requiring educational programs to provide appropriate accommodations, accessibility, and support services in compliance with ADA and Section 504 to ensure equal access to CTE programs.

Innovative Strategies Grant (Section 114(e)(1))
Perkins V funds distributed at the state level specifically earmarked to support innovative, experimental, or evidence-based approaches in career and technical education. These grants facilitate research-driven or pilot programs addressing emerging workforce needs, testing new methodologies, and fostering improvements in student outcomes.

L

Labor Market Information (LMI) (Section 134(c)(2)(B))
Data and analyses from federal, state, and local sources, including employment trends, workforce demand forecasts, wage information, and industry growth projections. LMI guides strategic planning and ensures that career and technical education (CTE) programs align effectively with regional labor market needs.

Local Applicant (Section 134(a))
An entity, such as a local education agency (LEA), postsecondary institution, or consortium, that submits an application within its defined geographic area to receive Perkins V funds. Applicants must demonstrate the capacity to implement compliant, responsive, and data-driven CTE programs.

Local Plan (Section 134(b))
A detailed strategic plan developed by eligible local recipients, outlining objectives, activities, budget allocations, and performance accountability measures. Local plans align Perkins V funding to identified workforce demands, student performance goals, and equitable support for special populations, as informed by the Comprehensive Local Needs Assessment (CLNA).

Local Use of Funds (Section 135)
Permissible expenditures of Perkins V funding by eligible local recipients, including equipment acquisition, professional development, program improvement initiatives, work-based learning, curriculum alignment, and activities that promote equity, innovation, and responsiveness to workforce needs.

M

Maintenance of Effort (MOE) (Section 211(b); 34 CFR 76.560–76.564)
A federal requirement that state and local recipients maintain consistent financial support for Career and Technical Education (CTE) programs from one fiscal year to the next. This ensures Perkins funds supplement, rather than replace, existing investments in CTE.

Military Service Member (Section 3(48)(I))
An individual who is currently serving or has previously served on active duty in the U.S. Armed Forces, including members of the National Guard or Reserves. Perkins V includes children of military service members within special populations, emphasizing tailored support and equitable access to CTE opportunities.

Mini-Grants (NC Perkins Handbook)
Smaller, targeted allocations of Perkins V funding provided to support innovative, specialized, or exploratory CTE projects. These grants encourage experimentation, allow rapid responses to emerging workforce needs, and promote localized solutions within broader CTE initiatives.

Modification (2 CFR 200.308)
An official amendment or reallocation of approved grant budgets or activities involving significant changes in spending categories. Modifications require approval to ensure that adjustments align with Perkins V goals, federal regulations, and approved local plans.

Modification Request (NC Perkins Handbook)
A formal procedure through which local recipients request approval to alter their approved Perkins V budgets or program activities. Requests must demonstrate compliance with federal and state guidelines and justify shifts in funding between allowable categories.

N

Non-traditional Fields (Section 3(33))
Occupations or career paths in which individuals from one gender comprise less than 25% of the total workforce. Perkins V supports targeted strategies to encourage participation in nontraditional fields, promoting gender diversity, equity, and access to high-wage, in-demand careers.

Non-traditional Program (Section 3(33))
Career and Technical Education programs specifically designed or enhanced to increase participation, retention, and success of individuals entering occupations where their gender represents less than 25% of the workforce, with particular emphasis on reducing barriers and addressing stereotypes and biases.

Non-traditional Student (NC Perkins Handbook)
Students who differ from the traditional postsecondary student profile, often older, employed full-time, financially independent, or balancing education with family and work responsibilities. Perkins V addresses their unique needs through flexible program structures, targeted services, and innovative support strategies.

P

Pass-through Entity (2 CFR 200.1)
A non-federal entity (such as a state agency or community college system office) that receives federal funds and provides subawards to subrecipients (local institutions or agencies) to implement parts of federal programs. Pass-through entities oversee subrecipient compliance, programmatic implementation, and financial accountability.

Pell Grant (Higher Education Act, Title IV)
Federal financial aid provided to eligible undergraduate students demonstrating financial need. Pell Grants support student access to postsecondary education, including tuition and related expenses in accredited programs.

Perkins Accountability System (Section 113)
The data collection and reporting framework used by the North Carolina Community College System to measure and report performance of Perkins-funded programs. This system tracks core indicators including credential attainment, student placement, retention, and equitable participation, ensuring continuous program improvement and federal compliance.

Perkins Core Indicators of Performance (Section 113(b)(2))
Federally established performance metrics used to evaluate the success of postsecondary CTE programs under Perkins V. These include retention and placement rates, credential completion rates, employment outcomes, and equitable access for special populations.

Postsecondary Levels of Performance (Section 113(b)(3))
Annual performance targets established for postsecondary institutions receiving Perkins V funds. Institutions are accountable for meeting these targets, such as rates of credential attainment, student retention, employment placement, and success among special populations, driving continuous improvement and accountability.

Postsecondary Size, Scope, and Quality (Section 134(c)(2)(B))
Criteria required by Perkins V ensuring that postsecondary CTE programs provide comprehensive educational opportunities, sufficient resources, adequate instructional capacity, and high-quality outcomes aligned with industry and workforce demands. These criteria must be addressed explicitly within the Comprehensive Local Needs Assessment (CLNA).

Professional Development (Section 3(40))
Ongoing educational and training activities designed to enhance the skills, knowledge, and effectiveness of educators, administrators, and staff involved in delivering CTE programs. Professional development aligns instructional practices with current industry standards, improves educational outcomes, and ensures compliance with Perkins V requirements.

Program Alignment (Section 134(b)(2)(B))
The intentional process of aligning curriculum, instructional strategies, credentials, and outcomes of CTE programs with current and projected regional labor market needs, industry standards, and employer requirements, informed by continuous labor market analysis and employer engagement.

Program Income (2 CFR 200.307)
Income generated directly by activities funded under a Perkins V grant, such as registration fees, service charges, or sales revenue. Program income must be reinvested into the program, following specific federal guidelines to enhance or expand grant-funded activities.

Programs of Study (Section 3(41))
Coordinated, non-duplicative educational pathways combining academic instruction, career-specific training, work-based learning, and co-curricular activities designed to prepare students comprehensively for postsecondary success and employment in high-demand, high-skill, high-wage careers.

Q

Quality Enhancement Plan (QEP) (SACSCOC Accreditation Standard 7.2)
A carefully designed, institution-wide plan developed by colleges to enhance student learning and institutional effectiveness. As part of accreditation requirements, the QEP involves measurable outcomes, broad-based institutional participation, and ongoing evaluation to ensure meaningful improvements in educational quality and student success.

R

Reasonable Costs (2 CFR 200.404)
Expenditures that are prudent, necessary, appropriate, and consistent with federal regulations for successfully implementing Perkins V grant-funded programs. Such costs must withstand public scrutiny and align with the project's goals and objectives, adhering to principles of economy, efficiency, and effectiveness.

Recognized Postsecondary Credential (Perkins V, Section 3(43))
Credentials earned during or after completing a postsecondary educational program, including industry-recognized certificates, licenses, associate degrees, and other qualifications valued by employers. Credential attainment is a critical Perkins performance indicator reflecting student readiness for employment and advanced career pathways.

Reserve Fund (Section 112(c))
A portion of state-level Perkins V funding set aside to support targeted statewide activities, address emerging workforce needs, and fund innovative or high-priority projects. Reserve funds enable flexibility in responding to local workforce conditions, addressing equity gaps, and fostering strategic improvements in CTE programs.

Reasonable and Necessary (Uniform Guidance, 2 CFR 200.403-404)
Criteria used to assess allowable expenses under Perkins V grants, ensuring funds are spent appropriately, prudently, and efficiently, directly supporting approved grant activities and program goals.

S

Sequential (Sequential) Course of Study (Section 3(41))
A structured sequence of related courses and instructional activities designed to progressively prepare students for specific careers or advanced educational opportunities. Perkins V requires such sequences to be coherent, rigorous, and aligned with workforce needs and industry standards.

Service Area Assignments (NCCCS)
Geographically defined areas assigned to specific community colleges or educational institutions responsible for providing equitable access to CTE programs. This ensures comprehensive statewide availability and effective delivery of CTE educational opportunities across all regions of North Carolina.

Single Parent (Section 3(48)(D))
An individual who is unmarried or legally separated and either pregnant or has primary custodial responsibility for dependent children. Perkins V emphasizes targeted support and equitable access to CTE for single parents.

Special Populations (Section 3(48))
Specific groups identified by Perkins V as requiring targeted support, including individuals with disabilities, economically disadvantaged individuals, English learners, homeless individuals, youth in foster care, single parents, displaced homemakers, military-affiliated youth, and individuals pursuing nontraditional careers.

Split-Time and Effort (2 CFR 200.430(i))
The accurate documentation of time and effort by employees whose responsibilities are divided among multiple federally funded projects. Proper reporting ensures compliance, accountability, and transparency in Perkins V grant management.

Stackable Credentials (Section 3(42))
A sequence of incremental credentials designed so students can progressively build qualifications and advance in their careers or further education. Each credential is valued individually by employers, while cumulatively they lead to higher-level certifications, degrees, or increased employability.

Standard Occupational Classification Codes (SOC Codes) (Bureau of Labor Statistics)
Standardized codes established by the U.S. Department of Labor to classify occupations based on job duties, skills, education, and training requirements. SOC Codes enable consistent tracking, reporting, and analysis of employment data to align CTE programs effectively with workforce needs.

State Board of Community Colleges (SBCC) (NC General Statutes Chapter 115D)
The governing body responsible for policy oversight, strategic planning, and governance of the North Carolina Community College System, ensuring compliance with state laws and effective administration of CTE and other educational programs.

State Board of Community Colleges Code (SBCCC) (N.C. Administrative Code, Title 1G)
Official administrative regulations governing the operations, programs, personnel, and policies of the North Carolina Community College System, ensuring consistency and compliance with state law.

State Funds (NC General Statutes Chapter 115D)
Revenue allocated by the North Carolina General Assembly to support community colleges and specific initiatives, including Career and Technical Education programs, infrastructure, faculty salaries, student services, and targeted state educational priorities.

State Plan (Section 122)
The comprehensive, federally mandated strategic plan developed by each state detailing the implementation, objectives, and administration of Perkins V funding. It outlines priorities, accountability measures, and commitments to addressing workforce demands, equity, and student success in CTE.

Subgroups (Perkins V, Section 113(b)(3)(C))
Distinct student groups categorized by demographics, such as race, ethnicity, gender, socioeconomic status, or special population status. Perkins V requires analysis and reporting of subgroup performance data to identify and address equity gaps in CTE programs.

Supplanting (2 CFR 200.403(f))
The prohibited practice of replacing existing state or local funds with federal Perkins V funds. Perkins V explicitly requires that federal funds supplement, not replace, state or local financial commitments, ensuring enhanced resources for CTE rather than merely shifting existing expenses to federal sources.

Sustainability (Sustainability Plan) (NC Perkins Handbook)
A strategic approach outlining how Perkins-funded programs, activities, or initiatives will be continued and financially supported beyond the initial grant period. The sustainability plan details methods for securing ongoing funding, resources, stakeholder engagement, and institutional support to maintain successful initiatives long-term.

T

Technical Skills (NC Perkins Handbook)
Occupationally specific skills and competencies required for successful performance in a particular career, typically validated through industry-recognized credentials, certifications, or licensure. Perkins V emphasizes aligning technical skill training with industry standards and labor market demands.

Transition Services (Section 135(b)(5)(D))
Activities and coordinated support designed to facilitate students' successful transitions from secondary to postsecondary education, postsecondary education to employment, or within career pathways, including career counseling, academic advising, financial aid assistance, and personalized transition planning.

Technical Assistance (Section 112(a)(3)(C))
Support provided by state or federal entities to local recipients, including guidance, training, and resources, aimed at improving the quality, compliance, and effectiveness of Perkins-funded programs.

V

Virtual Learning (Distance Education) (Section 135(b)(5)(K))
Educational delivery methods utilizing technology to provide instruction remotely, expanding access, flexibility, and equity for diverse student populations.

Vocational Code (Voc Code) (NCCCS)
Specialized accounting codes (10–19) used within the North Carolina Community College System to classify and track expenditures and instructional programs related specifically to career and technical education, ensuring accurate reporting and compliance.

Vocational Rehabilitation (VR) (Rehabilitation Act of 1973, Section 103)
Comprehensive support services aimed at helping individuals with disabilities prepare for, enter, or maintain gainful employment. Services include counseling, training, assistive technology, job placement, and workplace accommodations, promoting employment equity under Perkins V special population requirements.

W

Work-based Learning (WBL) (Section 3(55))
Educational experiences involving sustained interactions with industry or community professionals, conducted in real-world or simulated work environments. WBL includes apprenticeships, internships, job shadowing, clinical placements, and cooperative education, integrating classroom learning with practical skill development.

Workforce Innovation and Opportunity Act (WIOA) (U.S.C. 113-128)
Federal legislation that coordinates workforce development, education, training, and employment services. WIOA intersects with Perkins V in areas such as career pathways, workforce preparation, and alignment with labor market demands.

X

XDBR (Cross-Divisional Budget Report) (NCCCS)
An internal reporting designation within the North Carolina Community College System's accounting software (Colleague), specifically used in Perkins grant administration for tracking and reporting budgetary activities, expenditures, and compliance documentation.

Y

Youth Apprenticeship Program (Section 135(b)(5)(E))
Structured, paid work-based learning programs providing high school students with occupational experiences, mentoring, and formal classroom instruction aligned with specific career fields. These apprenticeships facilitate early career exposure, industry-recognized credentials, and smoother transitions from high school into the workforce or postsecondary education.

Youth with a Parent in the Military (Perkins V, Special Populations, Section 3(48)(I))
Youth who have a parent actively serving in the U.S. Armed Forces, including the National Guard or Reserves. Perkins V requires targeted support strategies for these youth to mitigate educational disruptions and ensure equitable participation and success within CTE programs