FY24 Fall Perkins Administrator Cohort Meeting

Forum for Excellence
September 20, 2023
9:30 am – 4:30 pm
<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00</td>
<td>Welcome and Introductions</td>
</tr>
<tr>
<td>09:30</td>
<td>Grant Administration- Payment Requests and Monitoring (no changes from last fiscal year), Budget Modifications and Reporting (in Amplifund)</td>
</tr>
<tr>
<td>10:00</td>
<td>CLNA 101 – Back to the Basics</td>
</tr>
<tr>
<td>10:30</td>
<td>Joint lunch + Learn with Adult Education (Ability to Benefit)</td>
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<tr>
<td>11:00</td>
<td>Building a Diverse CTE Leadership Pipeline Toolkit, Advance CTE</td>
</tr>
<tr>
<td>11:30</td>
<td>Secondary + Postsecondary Connections – EFE/Perkins Administrator Joint Learning Session (Perkins V State Plan)</td>
</tr>
<tr>
<td>12:00</td>
<td>Wrap up and Adjournment</td>
</tr>
</tbody>
</table>
Introductions: ICCB CTE Team

- Natasha Allan, Senior Director for CTE
- Janelle Washington, Director for CTE
- Ann Storey, Associate Director for CTE
- Dana Wynn, Associate Director for CTE
- Ahja Howard, Research Analyst for CTE
GRANT ADMINISTRATION:
Top 5 Things to Know for FY24

- Payment Requests
- Monitoring
- AmpliFund
- Reporting
- Budget Modifications
GRANT ADMINISTRATION: Payment Requests

Ann Storey, ICCB
Federal funds must be requested using the Request for Payment form provided by the Board. Vouchers will be processed upon submission of the Grantee’s Request for Payment form.

There is no limit to the number of payment requests that can be submitted during the fiscal year.

Final payment requests are due to the ICCB by August 1 of each year.

Payment requests and questions should be submitted to ICCB Grants Management at ICCB.grantpayments@illinois.gov.
GRANT ADMINISTRATION: Monitoring
Ann Storey, ICCB
Programmatic Monitoring

Monitoring will still utilize a risk-based assessment.

Fiscal and programmatic risk factors will be assessed separately.

Programs will be assessed individually.

Risk is assessed based on factors including the following:

- Unspent funds
- Timely submission of quarterly reports/budget modifications
- Experience of relevant leadership
- Significant technical assistance needs

Grantees will not receive a joint programmatic/fiscal report. Reports will be separate as they were in years past.
Monitoring Procedures

**Elevated Risk:**
- Grantee’s institutional risk score was in the top 20% of all Perkins grantees.
- Grantees designated as “elevated risk” will undergo an on-site monitoring visit from ICCB fiscal and program staff for a review of all Perkins grants awarded to the grantee by the ICCB during the applicable monitoring period.
- Grantees will be required to complete the self-assessment portion of the Monitoring Tool and submit documentation specific to the Documentation Checklist.
- Grantees will receive a formal monitoring report.

**Moderate Risk:**
- Grantees designated as “moderate risk” will undergo a desk review from ICCB fiscal and program staff for a review of all Perkins grants awarded to the grantee by the ICCB during the applicable monitoring period.
- Grantees will be required to complete the self-assessment portion of the Monitoring Tool and submit documentation specific to the Documentation Checklist.

**Low Risk:**
- Grantees will receive targeted technical assistance as it relates to all Perkins grants awarded by the ICCB.
- Grantees will not receive a formal monitoring report.
WHAT GRANTS WILL BE MONITORED?

The risk-based monitoring system applies to all grants you receive through the ICCB. Thus, your ICCB CTE liaison will be monitoring your Fiscal Year 2022 Perkins Basic grant, as well as any Perkins Title I Leadership grants your institution received.

If the Perkins Administrator is not the contact for a specific Leadership grant, then the applicable person(s) will be contacted.

All Title I Leadership grants will be monitored in accordance with their respective scope, assessment, and deliverable outcomes. Requested information could include the following:

- Budgetary and reporting items
- Applicable performance outcomes
- Required grant deliverable outcomes
- Supplemental documentation specific to the grant and/or grantee
GRANT ADMINISTRATION: AmpliFund
Janelle Washington, ICCB
# Functionality Overview

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Details</td>
<td>• Accessing Grants</td>
<td>Grants &gt;All Grants &gt;[Grant Name]</td>
</tr>
<tr>
<td>Performance Plan</td>
<td>• Review Performance Plan</td>
<td>Grants &gt;All Grants &gt;[Grant Name] &gt; Post-Award &gt;Performance Plan</td>
</tr>
<tr>
<td></td>
<td>• Enter Achievements</td>
<td></td>
</tr>
<tr>
<td>Financials</td>
<td>• Review Budget</td>
<td>Grants &gt;All Grants &gt;[Grant Name] &gt; Post-Award &gt;Financial</td>
</tr>
<tr>
<td></td>
<td>• Enter Expenses</td>
<td></td>
</tr>
<tr>
<td>Reporting Periods</td>
<td>• Submit Reporting Period (Expenses &amp; Achievements)</td>
<td>Grants &gt;All Grants &gt;[Grant Name] &gt; Post-Award &gt;Management &gt; Reporting Periods</td>
</tr>
<tr>
<td>Amendments</td>
<td>• Only Budget Category Amendment Types Allowed</td>
<td>Grants &gt;All Grants &gt;[Grant Name] &gt; Post-Award &gt;Management &gt; Amendments</td>
</tr>
</tbody>
</table>
Grant Details

Video Tutorial
Enter Expenses

Video Tutorial
**Tips for Entering Expenses**

- The initial budget is pulled over from your application.
- Line items were supposed to be entered at the expenditure category level, so in most cases, there should only be one available line item.
  - If so, enter the total expenses for the quarter for each expenditure category, rather than individual expenses.

This follows typical quarterly financial reporting, pictured below.

<table>
<thead>
<tr>
<th>Category/Program Expenses</th>
<th>Grant Expenditures</th>
<th>Current Approved Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Quarter 1</td>
<td>Quarter 2</td>
</tr>
<tr>
<td>Personnel Services</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>(Salaries and Wages)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Equipment</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Contractual Services</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Consultant</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Training and Education</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>General</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Administration/Indirect</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>TOTAL EXPENDITURES</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
GRANT ADMINISTRATION:
Reporting
Ann Storey, ICCB
Risk Conditions + Reporting

- Grant recipients were to complete an institutional assessment, the Internal Controls Questionnaire (ICQ), as well as a grant-specific programmatic risk assessment.
- These assessments determine the recipient’s risk-level.
- ICQ risk conditions: affect all grants at an institution
- Grant-specific programmatic assessment: individual grants (i.e. Perkins)

Colleges can have:
- Fiscal or programmatic risk conditions
- Fiscal and programmatic risk conditions
- Neither fiscal nor programmatic risk conditions
Reporting

Colleges are required to submit programmatic and financial quarterly reports 30 days after the end of a quarter (2 CFR 200.329)

• Programmatic reporting is located within the Annual Work Plan template.

• Financial reporting will be completed in AmpliFund.

• Both are due in AmpliFund on the following schedule:

<table>
<thead>
<tr>
<th>Report</th>
<th>Period</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>July 1 – September 30</td>
<td>October 30</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>October 1 – December 31</td>
<td>January 30</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>January 1 – March 31</td>
<td>April 30</td>
</tr>
<tr>
<td>Quarter 4/Final</td>
<td>April 1 – June 30</td>
<td>July 30</td>
</tr>
</tbody>
</table>
Submitting Quarterly Reports

Programmatic Reporting for Fiscal Year 24 will require multiple steps, including:

• Completion of the Quarterly Reporting sections in the Annual Workplan
• Submission of the Annual Workplan to AmpliFund
GRANT ADMINISTRATION:
Budget Modifications
Dana Wynn, ICCB
Grantees are allowed to make modifications up to ten percent (10%) or $1,000 (whichever is higher) of any specific line, prior to seeking approval.

Modifications that are greater than ten percent (10%) or $1,000 (whichever is higher) from any specific line OR that require a major change in scope, require the submission of a budget modification request.

The template will be emailed to you, along with your signed grant agreement, by Grants Management.
Budget Modifications

All other tabs should align with the approved modifications listed, including narratives.

The modification form must be submitted in Amplifund.

All fiscal year 2024 budget modifications must be submitted no later than May 30, 2024 for approval.

All modifications must be submitted and approved prior to any expenditure of funds. Modifications submitted after an expenditure of funds has occurred will not be retroactively approved.
Like quarterly reports, budget modifications, or amendments, will require multiple steps.

- Complete the modification form in the original Excel format and make the updates on the uniform budget document.
- Complete the amendment in AmpliFund and upload the modification form and uniform budget to AmpliFund.
Submit Amendments

Video Tutorial
Create AmpliFund Support Account

1. Go to [https://il-amplifund.zendesk.com](https://il-amplifund.zendesk.com)
2. Click the Sign up link
3. Enter your full name
4. Enter your email address
5. Complete the I’m not a robot check
6. Click the Sign up button
7. An email from support@zendesk.com will be sent to you via email
8. Click the link to set your password
AmpliFund Illinois Support Portal

Submit a support ticket:
support@il-amplifund.zendesk.com

Visit the support portal:
https://il-amplifund.zendesk.com

Supported Browsers:
- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+
Additional Resources: Programs of Study Reminders and AmpliFund Links
**Dual Credit**
- Dual credit is a required component of a fully-developed program of study.
- Dual credit must be offered for program certificates and degrees.

**Quality Component 3: Instructional Sequence**
- Remember to include a list of participating high schools.
- Remember to include a course sequence.

**Quality Component 4: Work-Based Learning**
- Remember to address both parts of the component: Work-based learning and CTSOs or team-based challenge.

**CTSOs and Team-Based Challenges**
- A fully-developed program of study must include either a CTSO or a team-based challenge.
- CTSOs that are not nationally recognized can be used to meet Quality Component 4; however, Perkins funds may only be utilized to support nationally recognized CTSOs.
- In the absence of a CTSO, team-based challenges may be incorporated.
- "Team-based challenges should require students to utilize and demonstrate competency with work-based knowledge and skills as they work to solve an authentic work-based problem as members of a collaborative team." (P-20 Network)
Revision Tips

Submit revisions as quickly as possible, especially if utilizing funds in FY24.

Email revisions to ICCB.posapproval@illinois.gov. Please CC your Perkins liaison.

Type revisions into original approval form.

Type revisions in bold or different color font.

Include the feedback form sent by liaison.

Label and attach any additional evidence.
Perkins Post-Award Guide
AmpliFund Virtual Office Hour

SAVE THE DATE

OCTOBER 24, 2023
AT 11:00AM

Virtual link will be emailed to the Perkins Administrators Listserv
ICCB CTE STAFF CONTACT INFORMATION

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217.558.4929
Break
ICAPS and Ability to Benefit Information
What is the difference between IET and ICAPS?

- **IET = Integrated Education and Training**
  - Federal level name
  - Required in the IL State Plan (2019) which implements the Perkins V Law
  - CTE world

- **ICAPS = Integrated Career & Academic Preparation System**
  - Illinois’ version of IET
  - Modeled off Washington state’s I-BEST model
  - Illinois requires collaborative-teaching additionally
  - Been utilized since approximately 2012
  - Adult Ed world
Components of an ICAPS

3 required pieces:
1 - Adult Education services (often in the form of a support class)
2 - Workplace skills (employability skills)
3 - Workforce Training (on-the-job, apprenticeships, clinicals, CTE coursework, etc.)

IL additionally requires a collaborative-teaching component.
Collaborative Teaching requirement

- Collaborative Teaching - ICAPS requires 25% collaborative teaching. This means the adult education support course teacher and the CTE course teacher need to work together for at least 25% of their teaching requirements.
  - Pre-planning
  - Checking on attendance/missing students
  - Sharing curriculum
  - Possibly co-teaching in the same classroom
  - Support services for shared students

- Key Piece: The CTE instructor is the expert in CTE content; the Adult Ed instructor is the expert in the Adult Ed content!
List of approved ICAPS

We have 125 approved ICAPS at community colleges across the state of IL.

We have only 1 community colleges that does NOT have an approved ICAPS, but they have submitted for approval, so they are in progress. 😊

# of ICAPS in each Pathway (across the state):

- Health Science - 51
- Manufacturing - 32
- Information Technology - 17
- Trans., Distribution, & Logistics - 15
- Business Management & Administration - 4
- Architecture & Construction - 3
- Education & Training - 2
- Law, Public Safety, Corrections & Security - 1
Why should my college offer an ICAPS?

- Increased enrollment (think special pop.s)
- Increased tuition
- Fill seats to make a class → happy instructor
- Benefit current CTE students
- Expand exposure to your program
- Provides opportunity for internal collaboration
- Provides discussion opportunity for employer advisory committees
ICAPS and Ability to Benefit (ATB)

Ability to Benefit can be another funding source for ICAPS students, but also for students that come to CTE without a high school diploma.

Talk with your financial aid office about ATB options provided at your institution.
ATB Basics

Students without a High School Diploma can qualify 3 ways:

1 - take and achieve a pre-set score on a pre-approved test from US Department of Education

2 - take and pass 6 credit hours

3 - qualify through a state defined process plan - IL was approved for this in May 2022.
ATB Information

Since the approval of the IL State-Defined Process Plan, ICCB has:

- presented at a variety of conferences on the plan
- created and recorded modules about the plan available on the ICCB website
- created and shared a User Guide for the plan on the ICCB website
- Patty Zuccarello and I will be available throughout the Forum to share QR Codes to access these resources at a table in the hallway.
More ATB Information

- Implementing the IL State Plan requires a Team:
  - Financial Aid staff
  - Adult Education staff
  - CTE staff
  - Registration staff
  - Marketing staff
  - Testing staff
  - Advising staff
  - Various support services staff
  - Administrative Buy-in (President ??)
More ATB Information - again

- Webinars about the Modules - Dates and times below
  - Monday, October 23 at 1:00 pm
  - Wednesday, November 8 at 1:00 pm
  - Monday, December 4 at 1:00 pm
  - Wednesday, January 31 at 1:00 pm

- More information coming soon! Check the ICCB ATB Website for details - https://www2.iccb.org/adult_ed/provider-resources/
Questions?

1- Your CTE Liaison (ICAPS)

2 - Angela Gerberding (ICAPS and ATB)
   Director of Work-Based Learning, ICCB
   Angela.gerberding@illinois.gov
   217-558-2162

3 - Aimee Julian and Brittany Boston (ICAPS)
   IL Center for Specialized Professional Support
   Aimee - alafoll@ilstu.edu
   Brittany - bnfeese@ilstu.edu