Perkins Carry Over Modification Instructions

Before You Begin

Your modification process will need **two separate Perkins documents**:

1. **Your college's Local Plan and Budget**
2. **Budget Modification Template**

Preparing Your Documents

1. **Prepare Your Current Local Plan and Budget**:
   - Open the **2024-2025 approved plan's Excel file** previously submitted in NCPerkins Moodle. This is your college's approved multi-tab Excel file submitted by May 31, 2025.
   - **Rename this file** Please put your college's name first (e.g., "Community College Modification MMYYYY"). This will be the file you'll submit to Moodle after making your updates.
2. **Download the Budget Modification Template**:
   - In Moodle, go to **My Courses**, then **2025-26 Perkins Basic Grant**, and find the **"Budget and Plan Modifications (submit as needed)"** section. Download the modification template from here.

Steps to Modify Your Budget

1. **Enter Your Current Budget**:
   - Go to the **Budget tab** in your renamed **Local Plan and Budget** file and locate your approved total budget found in **Column F**.
   - Next, in the **Budget Modification Template**, enter this budget total in **Column F: "Enter Current Budget"**.
2. **Update Your Allotment**:
   - In the **Local Plan and Budget** file, locate **cell A2** labeled "Enter Your College's Total Allotment Below."
   - Update the planning allotment to match the new **total allotment**. This includes your state board-approved budget, plus your carry over and any needed adjustments between your planning budget and state-approved budget.
   - **Important Note:** A college's maximum allowable administration (Voc Code 10) is based solely on the state board-approved budget, which is .05% of the college's budget excluding the required WIOA infrastructure contribution. **Administration budget cannot**

be allocated to carryover funds. Contact your designated Assistant Director for Perkins Regional Services if you need this amount.

3. **Make and Document Budget Adjustments**:
    - Make any updates you need to the current budget, adding additional funds where necessary.
    - Document all modifications in **Column H** of your revised plan:
        - **For additions**: Enter the amount and a brief explanation in the **Status Update column** (merged Columns I & J).
        - **For removals**: Remove the amount, select "removed" in the status, and note the removed amount in the Status Update.
    - **New Activities**: If adding new activities, list where the need for this activity is addressed in your CLNA in **Column C**.
4. **Add New Rows as Needed**:
    - If adding rows within a vocational (voc) code, insert these **above the last row** of the code to ensure the formulas continue to function correctly on the budget tab.
5. **Check Your Remaining Budget**:
    - Confirm that all funds are budgeted accurately. The "Remaining Budget" in **cell A5** should equal **0**.
6. **Apply Special Updates for Specific Voc Codes**:
    - **Voc Code 17**: If you make changes, also update the **Equipment tab**.
    - **Voc Code 18**: If adjusted, make corresponding changes on the **Salaries and Benefits tab**.
7. **Enter Modifications in the Template**:
    - In the **Budget Modification Template**, document each change in the **"Enter Change Requested"** column, ensuring the "Proposed Modified Budget" matches the budget tab in your revised plan.
    - In the justification section add "see submitted Local Plan"

Submitting Your Modification

1. **Get Signatures**:
    - Make sure the **budget modification** form is signed by both your primary Perkins contact and your college's CFO. The modified plan does not need to be signed.

2. **Upload to NCPerkins Moodle**:
    - In Moodle, go to the **"Budget and Plan Modifications"** section and click on **"Submit a Local Plan & Budget Modification Request"** to upload both your modified local plan and the signed budget modification form.
3. **Approval Process**:
    - Once the Executive Director and Assistant Director for Perkins/CTE have approved your modification, a signed copy will be emailed to the Perkins Primary Contact. At that point, your college may begin implementing the approved changes to your plan and budget.
    - **Important Note:** Follow your college's internal process to adjust the Perkins budget accordingly for each modification, as this will help prevent future budget discrepancies.
    - Please keep these documents in your college's official Perkins records.