

Completing the Perkins Local Plan and Budget

These instructions provide a step-by-step guide for preparing, reviewing, and submitting the annual Perkins V Local Plan and Budget using the Perkins Local Plan and Budget Template.

Before You Start

- Save the file as “College Name_Local Budget and Plan” as an Excel Macro-Enabled Workbook (.xlsm) file type.
- Have your approved Comprehensive Local Needs Assessment (CLNA) available.
- Confirm your initial Perkins allocation and carryover amount (if available).
- Identify your maximum Administration amount (not to exceed 5% of initial allocation)
- Identify planned Perkins-funded activities, equipment, staffing, and CTSO support.
- Click “Enable Macros” when opening the file.

Initial Local Plan and Budget

Use the instructions below to complete and submit your initial Local Plan and Budget.

STEP 1: COMPLETE THE BUDGET TAB

Complete the following steps in the Budget Tab.

1. Select College Name from dropdown list in cell A1.
2. Enter the College Initial Allocation in cell H1.
3. Enter the College Carryover Allocation in cell H2 (if available).
4. Enter Date in cell B4.
5. Click on the Local Plan Tab.

STEP 2: COMPLETE THE LOCAL PLAN TAB

Enter line-item activities to explain how Perkins V funds will be used to address CLNA gaps and meet Perkins V Section 135(b) requirements. The Remaining Balance (cell F2) will calculate the remaining balance as line-items are entered in the Local Plan.

Voc Code 10: Administration

Administration costs are an optional use of funds but may not exceed 5% of the initial allocation.

Complete the following steps if planning on using administration funds.

1. Enter maximum allowed administration amount (5% of initial allocation) in cell G2.
2. Enter the planned amount for administration in cell H5.
3. Select “Planned” from the dropdown list in cell J5.
4. Verify Admin Within Allowance (cell H2) status.
 - a. If displays “OK”, no further action required.
 - b. If displays “Exceeds Max”, decrease planned amount in cell H5 as it is over the 5% threshold.

Voc Codes 11–16: Required Use of Funds

Each Required Use of Funds in Voc Codes 11–16 must include one or more activities aligned to CLNA gaps. Additional activities addressing CLNA gaps not supported by Perkins V funding should be included. Complete the following steps for each line-item in each Voc Code.

Completing the Perkins Local Plan and Budget

1. Select the CLNA Section addressed by the activity from the dropdown list in column C.
 - a. Multiple sections can be selected by opening the dropdown list again.
2. Enter the Gap Number from the selected CLNA Section in column D.
 - a. If an activity addresses more than one CLNA gap, enter all applicable gap numbers in the cell using multiple lines within the same cell.
 - b. Click inside the Gap Number cell for the activity.
 - c. Type the first CLNA gap number exactly as it appears in the CLNA.
 - d. Press Alt + Enter (Windows) or Option + Enter (Mac) to move to a new line within the same cell.
 - e. Type the next gap number on the new line.
3. Enter an activity title in column E.
4. Enter a brief description of the activity in column F.
5. Select the planned source from the Source of Funds dropdown list in column G.
6. Enter the planned amount for the activity in column H.
7. Select "Planned" from the dropdown list in column J.

Voc Code 17: Equipment

Equipment expenditures are an optional use of funds. A Local Plan and Budget with equipment purchases greater than 65% will be subject to Equipment Monitoring protocols. Complete the following steps if planning on purchasing equipment.

1. Select the Voc Code (11–16) aligned to the Require Use Activity from the dropdown list in column C.
 - a. Multiple Voc Codes can be selected by opening the dropdown list again.
2. Enter the Voc Code Activity Number in column D.
 - a. If multiple Voc Code Activity Numbers are aligned, enter all applicable activity numbers in the cell using multiple lines within the same cell.
 - b. Click inside the Voc Code Activity Number cell for the activity.
 - c. Type the first activity number exactly as in the Voc Code (e.g., 13.2, 16.5).
 - d. Press Alt + Enter (Windows) or Option + Enter (Mac) to move to a new line within the same cell.
 - e. Type the next activity number on the new line.
3. Enter the equipment name in column E.
4. Enter a brief description of the equipment in column F.
5. Select "Perkins" from the Source of Funds dropdown list in column G.
6. Enter the estimated cost of the equipment in column H.
7. Select "Planned" from the dropdown list in column J.
8. Enter the quantity planned to purchase in column L.
9. The Per Unit Cost will automatically calculate.

Voc Code 18: Wages

Salary and wages expenditures are an optional use of funds. Complete the following steps if planning on salary and wages expenditures.

1. Select the Voc Code (11–16) aligned to the activity from the dropdown list in column C.
 - a. Multiple Voc Codes can be selected by opening the dropdown again.

Completing the Perkins Local Plan and Budget

2. Enter the Voc Code Activity Number in column D.
 - a. If multiple Voc Code Activity Numbers are aligned, enter all applicable activity numbers in the cell using multiple lines within the same cell.
 - b. Click inside the Voc Code Activity Number cell for the activity.
 - c. Type the first activity number exactly as in the Voc Code (e.g., 13.2, 16.5).
 - d. Press Alt + Enter (Windows) or Option + Enter (Mac) to move to a new line within the same cell.
 - e. Type the next activity number on the new line.
3. Enter the position title (matching the job description uploaded to the NCP Perkins Grant Management System) in column E.
4. Enter the employee's name (if available) in column F.
5. Select the planned source from the Source of Funds dropdown list in column G.
6. Enter the planned salary/wage for the employee in column H.
7. Select "Planned" from the dropdown list in column J.
8. Enter the planned percentage of CTE work in the column L.
9. Enter the date (Month Date, Year) the position was first funded with Perkins V funds in column M.
10. Enter the planned percentage of the position funded by Perkins V funds in column N.
11. Select the planned Time and Effort monitoring from the dropdown list in column O.

Voc Code 19: CTSOs

CTSO activity expenditures are an optional use of funds. Complete the following steps if planning on CTSO activity expenditures.

1. Select the Voc Code (11–16) aligned to the activity from the dropdown list in column C.
 - a. Multiple Voc Codes can be selected by opening the dropdown again.
2. Enter the Voc Code Activity Number in column D.
 - a. If multiple Voc Code Activity Numbers are aligned, enter all applicable activity numbers in the cell using multiple lines within the same cell.
 - b. Click inside the Voc Code Activity Number cell for the activity.
 - c. Type the first activity number exactly as in the Voc Code (e.g., 13.2, 16.5).
 - d. Press Alt + Enter (Windows) or Option + Enter (Mac) to move to a new line within the same cell.
 - e. Type the next activity number on the new line.
3. Enter an activity title in column E.
4. Enter a brief description of the activity in column F.
5. Select the planned source from the Source of Funds dropdown list in column G.
6. Enter the planned amount for the activity in column H.
7. Select "Planned" from the dropdown list in column J.

STEP 3: FINAL REVIEW AND SUBMISSION

Once all line-item activities have been entered into the Local Plan, complete the following steps to review and submit the file.

1. Verify the Remaining Balance (cell F2) displays \$0.00. Revise line-items if a positive or negative balance is displayed.

Completing the Perkins Local Plan and Budget

2. Verify the Equipment % (cell J2) for reference.
3. Verify Voc Code totals on the Budget Tab match the totals Local Plan Tab.
4. Submit the file to the NCP Perkins Grant Management System.
5. The NCCCS Assistant Director for Perkins Regional Services will route the file through DocuSign for electronic approvals.

Completing the Perkins Local Plan and Budget

Modifying an Approved Local Plan and Budget

Use the instructions below to modify an approved Local Plan and Budget.

STEP 1: ADDING CARRYOVER ALLOCATION

Complete the following steps in the Budget Tab if adding a Carryover Allocation.

1. Enter the College Carryover Allocation in cell H2 (if available).
2. Enter Date in cell B4.
3. Click on the Local Plan Tab.

STEP 2: REVISING THE LOCAL PLAN TAB

Revise or add line-item activities to explain how Perkins V funds will be used to address CLNA gaps and meet Perkins V Section 135(b) requirements. The Remaining Balance (cell F2) will calculate the remaining balance as line-items are revised in the Local Plan. Complete the following steps if revising any line-item activity.

1. Revise amounts in column H to approved totals from previous modifications if applicable.
2. Enter an amount in column I to revise the approved amount in column H.
 - a. Enter a positive amount for an increase in the activity (e.g., enter 2,000 if adding \$2,000 to the approved activity amount).
 - b. Enter a negative amount for a decrease in the activity (e.g., enter -2,000 if decreasing \$2,000 to the approved activity amount).
3. Select the appropriate status from the Status of Activity dropdown list in column.
4. Enter a brief status update or revision description in column K.
 - a. A status of “Added”, “Removed”, and “Revised” will require an explanation.
5. Enter the following items if revising any item in Voc Code 17: Equipment.
 - a. Revise the quantity planned to purchase in column L.
10. Enter the following items if revising any item in Voc Code 18: Wages
 - a. Enter the employee’s name if blank in column F.
 - b. Revise the percentage of CTE work in the column L.
 - c. Revise the percentage of the position funded by Perkins V funds in column N.
 - d. Revise the Time and Effort monitoring from the dropdown list in column O.

STEP 3: FINAL REVIEW AND SUBMISSION

Once all line-item activities have been entered into the Local Plan, complete the following steps to review and submit the file.

1. Verify the Remaining Balance (cell F2) displays \$0.00. Revise line-items if a positive or negative balance is displayed.
2. Verify Modification Status (cell H2) status.
 - c. If displays “OK”, no further action required.
 - d. If displays “Exceeds Max”, revise line-items to within budget.
3. Verify the Equipment % (cell J2) is below 65%. A Local Plan and Budget with equipment purchases greater than 65% will be subject to Equipment Monitoring protocols.
4. Click on the Budget Tab.
5. Verify Voc Code totals on the Budget Tab match the totals Local Plan Tab.

Completing the Perkins Local Plan and Budget

6. Submit the file to the NCP Perkins Grant Management System

The NCCCS Assistant Director for Perkins Regional Services will route the file through DocuSign for electronic approvals.