

**Perkins Monitoring and Technical Assistance Manual**

Montana Office of Public Instruction  
Division of Career, Technical and Adult Education

**Perkins Monitoring**  
and Technical Assistance Manual

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# Perkins Monitoring and Technical Assistance Manual

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# Perkins Monitoring and Technical Assistance Manual

## Purpose

The purpose of this document is to meet state and federal Perkins requirements for a monitoring system and to provide technical assistance to local district administrators, teachers, and other staff for continual improvement of state approved Career and Technical Education (CTE). Through an on-site (or desktop) monitoring process, the state CTE staff can identify and share best practices and program strengths as well as identify areas for program improvement. These monitoring visits are also intended to facilitate communication and information exchange that will assist districts with such challenges as:

- Improving program quality
- Improving program linkages with state and national standards
- Expanding student opportunities to achieve national certification and credentials for CTE studies
- Feedback received from participants used in the planning and development of future professional development and goals for CTE in Montana

## Process

Each year the Office of Public Instruction (OPI) monitors at least 20% of secondary school districts receiving Perkins funds. Consequently, each school district will be visited at least once every five years. OPI may conduct additional targeted visits to a school when determined by department information. After reviewing the criteria bulleted below, your school may be given the choice of a desk audit rather than a site visit. The justification for a desk audit will be determined if the following indicators are all in compliance:

- Electronic submission of past two year's Perkins budgets are in compliance with allowable expenses
- No portion of the previous year's Perkins allocation returned
- District is not considered "at-risk" or are on the "watch list" for fiscal reasons
- No record of late submission of data for previous two years (Accountability data)
- All CTE teachers have approved programs of study (Big Sky Pathways) for three or more years
- Evidence that CTE teachers routinely participate in professional development
- Advisory council meeting minutes are on file
- School district has had a monitoring or technical assistance visit in the last five years

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## **Notification/Confirmation of Visit**

In order to assure a smooth and successful on-site visit, planning and preparation in advance of the visit must occur. Notification of visits will be provided at least two weeks prior to the visit through an e-mail or phone call to the Perkins contact person identified on your Perkins application. Once a verbal or e-mail confirmation of the date, time, and location of the meeting is arranged, the OPI staff will send out a letter reiterating the details of the visit.

## **School Obligation Prior to Visit**

- The school district to be visited will send an electronic copy of the Perkins budget for the year to be monitored\*
- Advisory Council minutes for each program advisory council will be electronically submitted to the OPI\*
- School catalogue/coursework showing how Big Sky Pathways are being promoted in the school will be electronically submitted to the OPI (or school website shared with OPI staff)\*
- The school district will notify all school Staff and CTE teachers of the time of the visit
- A Program Self-Assessment will be electronically sent and must be filled out for your school's chosen Big Sky Pathway for review during the visit

\*If the school district cannot provide electronic documents, these will be reviewed during the site visit.

## **Office of Public Instruction's Obligation Prior to Visit**

- Staff will review the Perkins E-grant for the year to be reviewed
- Staff will check with the fiscal office to determine if Perkins expenditures were complete
- Staff will check accountability data to see if deadlines were met
- Staff will check accountability performance indicators (CTE Report Card)
- Staff will check Student Participation Reports for teacher licensure and approved programs of study (Big Sky Pathways) for three or more years
- Staff will check the E-grant for evidence that CTE teachers routinely participate in professional development
- Staff will determine if the school district has had a monitoring or technical assistance visit in the last five years
- Staff will check with program specialists regarding their specific program areas in each school
- Staff will send an electronic copy of the Program Self Assessment for your Big Sky Pathway(s)

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## **Desktop Audit Option**

After the OPI staff has reviewed the documents submitted by the school district, the staff member may make a recommendation to the CTE Division Administrator for a Desktop Audit in lieu of an on-site school visit. If a desktop audit is recommended, the following questions will be sent to the school to fill out and return. Schools have the right to ask for an on-site visit if they prefer.

## **On-site Visit Questions**

The actual on-site visit varies in length depending on school district size. The OPI staff will first meet with the school administrator, district clerk and CTE administrator (if applicable) to review the Perkins budget submitted, the CTE Report Card for the school (Annual Performance Indicators for CTE students), and to discuss the following questions:

### **Fiscal Officer**

1. Did the district experience an increase or decrease in local/state or federal funding for CTE programs in the past year?
2. Describe your district's purchasing policies and procedures from requisition to delivery.
3. If the school used federal funds to purchase equipment (defined as having a useful life of more than one year and costing \$5000 or more), what process is used to make sure the item is properly tagged and entered on the equipment inventory?
4. Was the Perkins Purchasing Policy Manual helpful?

### **School Administrator and/or CTE Administrator**

1. How do you develop your annual Perkins budget? Who is involved? Do you use Advisory Committee workforce recommendations or consider high wage, high demand, or high skill employment?
2. How do you collect the data on student concentrators in CTE? Do you have a written program of study for students to follow?
3. Do you still have "Blended concentrators"? Do you see this changing with the focus on careers?
4. A. How do you maintain confidentiality for CTE Follow-up placement data collection?

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- B. What kind of training do interviewers receive?
5. Do your eligible concentrators take a technical skill assessment?
  6. What process do you use to inform students who are eligible for articulation credit? Who keeps track of this?
  7. How does your district track your concentrators? (where they are after graduation)
  8. Was the Perkins Purchasing Manual helpful?

### **CTE Instructor(s)**

OPI staff will conduct classroom visits and interviews with CTE teachers and selected CTE students. Time will be allotted to meet with all CTE instructors, if possible. If your school has more than one instructor per CTE program, a small group meeting is appropriate per program area. The Program Self-Assessment for your school's Big Sky Pathway(s) will be reviewed.

1. Implementation of Standards/Course Content—What is taught in your course or program?
2. Professional Development—What professional development opportunities related to your content area have you participated in within the last two years?
3. Recommended Equipment—Do you have what you need to deliver a quality program?
4. Established Advisory Committee—Describe your advisory committee and their activities.
5. Expenditure of Funds—How do you use state/federal funding for your program?
6. Academic Integration—What are you doing to assure academic achievement in literacy and math for your students?
7. Program Level Data—Do you know what Core Performance Indicators are?
8. Program Access—What do you do to encourage enrollment and completion for students who are of the opposite gender to most of your students (non-traditional)?

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9. A. CTSO Participation—Tell me about your involvement with Career Technical Student Organizations (CTSO)'s. How are you funding your activities?  
B. If you don't have a CTSO, how are you integrating leadership into your program area?
10. Work-based Learning—How are work-based learning experiences incorporated into your program?
11. Post-Secondary/Secondary Articulation—Are you aware of any state-wide articulations in your program area?
12. Unique Program Features—What would you like us to know about this program?
13. Content Specific Question—Designed by OPI Program Specialist for their specialty area
14. What is the application and selection process for admission to CTE programs?
15. Are there any pre-requisites for enrolling in CTE courses?
16. Describe the work-based learning opportunities available to students in CTE programs.
17. How do you evaluate appropriate and safe worksites for these placements?
18. Have you received any information regarding Career Clusters and Big Sky Pathways

### **CTE Concentrator Interview**

1. Please describe what you do/learn in this class?
2. How did you find out about this program?
3. What work-based learning experiences have you participated in?
4. Are you aware of, or have you participated in a CTSO?
5. Are you aware of any college credit available if you complete this program and go to a two-year college?
6. What do you especially like about this program?

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7. What are your career goals?
8. If you could change something about this program what would it be?
9. Has the math, science, English, social studies from this program helped you with your general studies?

### **On-site Review Report**

The OPI specialist conducting the monitoring visit will send the school district a written report of the visit findings within two weeks of the visit. Any issues of concern and/or non-compliance will be noted in the letter and the Program specialist(s) will work with the school to determine an appropriate resolution. As a last resort, any unresolved non-compliance issues may result in not approving the CTE program for continued state and federal financial support.