

CCCAOE Spring 2026 Perkins Pre-Conference Session:

Fiscal Health through Partnership: A Collaborative Approach to Perkins V Resource Alignment

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Agenda

HOUSEKEEPING

PERKINS V OVERVIEW

CLNA OVERVIEW

RISK ASSESSING

INTERACTIVE SCENARIOS

ACTION PLANNING

KEY DATE REMINDERS & CLOSING

Housekeeping

Questions

To best facilitate, we ask for questions throughout the presentation.

Presentation Slides

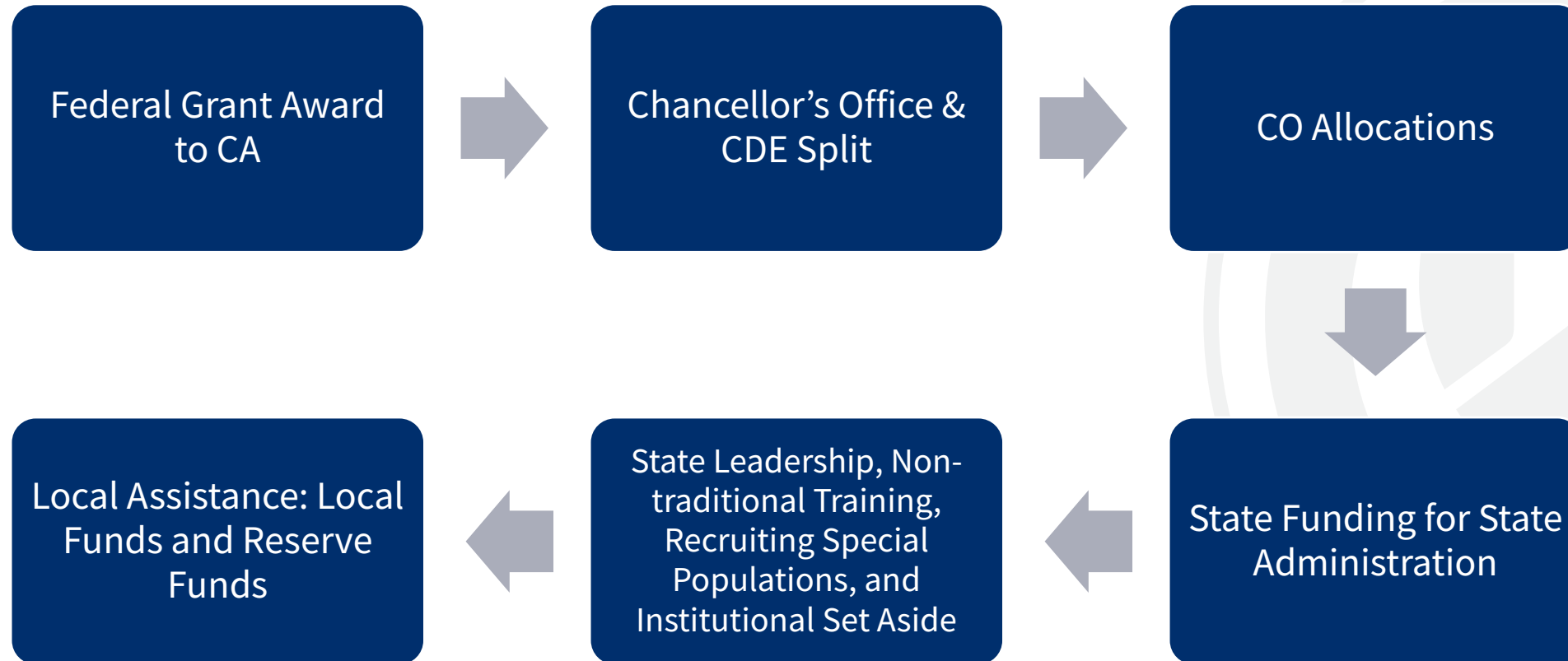
This presentation with additional resources will be posted to the Perkins V Program websites after remediation.

Perkins V Overview

Perkins V Background

- ❖ Originally passed as the Vocational Education Act of 1963
- ❖ Renamed the Carl D. Perkins Act in 1984
 - It was enacted **to increase learner access to high-quality CTE programs of study**, especially to those students who had been underserved in the past or who had substantial education needs.
 - The goal was to provide individuals with the academic and technical knowledge and skills they need to prepare for careers in current or emerging employment sectors.
 - It is a principal source of federal funding to states and discretionary grantees for the improvement of secondary and postsecondary career and technical education programs across the nation.
- ❖ The **Strengthening Career and Technical Education for the 21st Century Act (Perkins V)** was signed into law on July 31, 2018.

Perkins V Distribution



Why does fiscal health matter in Perkins V ?



Impacting Program /Student Outcomes through Resource Alignment

Perkins V Resource Alignment

Regional Approach

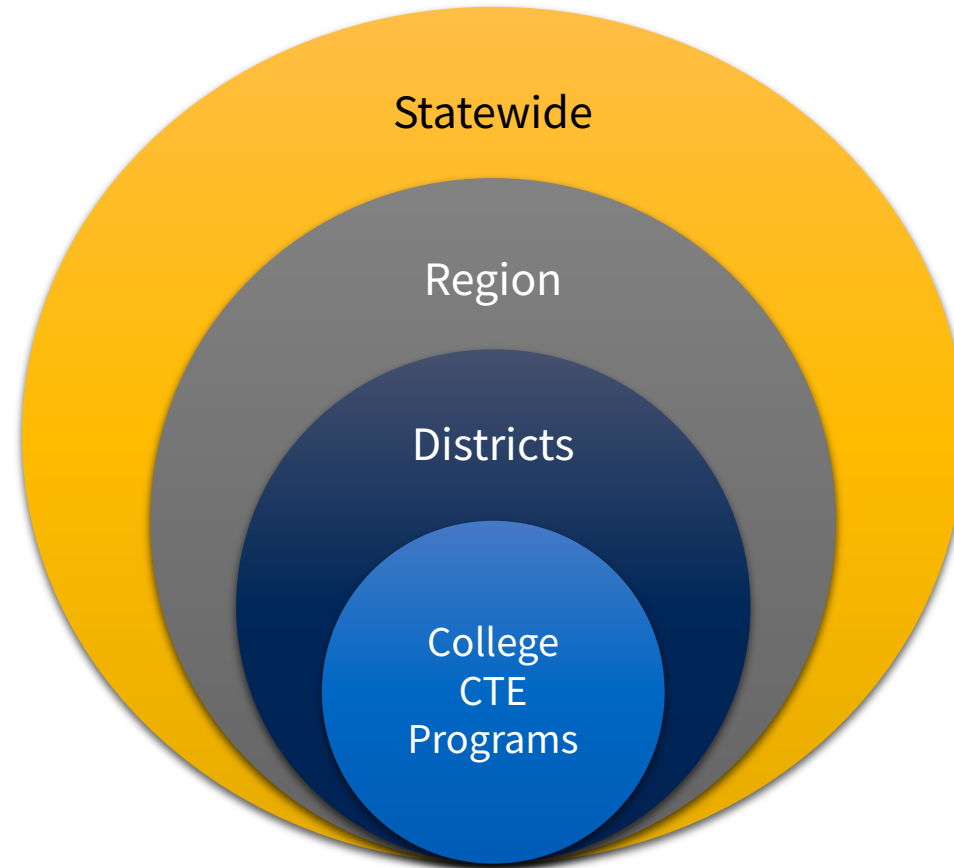


Braiding Funds



Cross-program Leverage

Partnership Structure under Perkins V



Comprehensive Local Needs Assessment (CLNA)

CCCCO Perkins V References

- CCCCCO — Perkins Datamart (Core Indicators, Negotiation reports): <https://datamart.cccco.edu/Perkins/Main.aspx>
- CCCCCO — CLNA Framework (2026–27): <https://www.cccco.edu/-/media/CCCCO-Website/docs/perkins/perkinsclnaframework202627002a11y.pdf>



Section 1: What the Perkins V Law States About Stakeholders in the Needs Assessment Process:

In conducting the comprehensive local needs assessment under subsection 134(c), and developing the local application described in subsection 134(b), an eligible recipient shall involve a diverse body of stakeholders, including, all of the following, at a minimum—

Representatives of career and technical education programs in a local educational agency or educational service agency, including teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals.

Representatives of career and technical education programs at postsecondary educational institutions, including faculty and administrators.

Representatives of the State board or local workforce development boards and a range of local or regional businesses or industries.

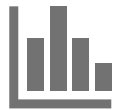
Parents and students.

Representatives of special populations.

Representatives of regional or local agencies serving out-of-school youth, homeless children and youth, and at-risk youth (as defined in section 1432 of the Elementary and Secondary Education Act of 1965);

Representatives of Indian Tribes and Tribal organizations in the State, where applicable; and any other stakeholders that the eligible agency may require the eligible recipient to consult.

CLNA Required Elements



Element #1: Student Performance on Required Performance Indicators (Disaggregated)



Element #2: Program Size, Scope, and Quality to meet the needs of all Students



Element #3: Progress towards Implementation of CTE Programs of Study



Element #4: Improving recruitment, retention, and training of CTE professionals, including underrepresented groups

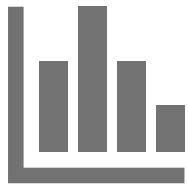


Element #5: Progress towards equal access to CTE programs for all students



Element #6: Alignment to Labor Market Information (LMI)

CLNA Element #1



Student Performance on
Required Performance
Indicators (Disaggregated)

Based on Core indicator reports, what is your data tell you?

- ✓ What strengths and gaps were identified by your assessment regarding student performance?
- ✓ What subpopulation of students could benefit from additional evidence-based services/supports?
- ✓ What priorities are you set to address the gaps or challenges identified for this element that will be presented in your local application?
- ✓ What new or current partners will support student performance priorities identified?
- ✓ What new and/or modified policies, evidence-based activities, or structures must be developed and implemented to improve student performance?

CLNA Element #2



Program Size, Scope,
and Quality to meet the
needs of all Students

California defines size, scope and quality as follows:

- Size: Parameters/resources that affect whether the program can adequately address student-learning outcomes.
- Scope: Programs of Study are part of or working toward inclusion within a clearly defined career pathway with multiple entry and exit points.
- Quality: A program must meet two out of the following three criteria: the program develops
 - (1) high skilled individuals,
 - (2) individuals who are competitive for high wage jobs,
and
 - (3) individuals who are trained for in-demand occupations.

CLNA Element #3



Progress towards Implementation
of CTE Programs of Study

- ✓ **Strengths and gaps** were identified by your needs assessment
- ✓ **Priorities have been identified** in the needs assessment process to address gaps or deficits in CTE
- ✓ New and/or modified policies, activities, or structures must be developed and implemented, **especially to ensure participation and success of special population groups**
- ✓ **Professional development, resources, or support** is needed to enhance the structure of and enhance student opportunity to progress within a CTE

CLNA Element #4



Improving recruitment, retention, and training of CTE professionals, including underrepresented groups

- ✓ Strengths and gaps were identified by your needs assessment regarding **recruitment, retention, and training of CTE professionals, including underrepresented groups**
- ✓ **Priorities** regarding recruitment, retention and training of a diverse field of CTE professionals were uncovered in the needs assessment process
- ✓ New and/or modified policies, activities or structures must be developed and implemented
- ✓ Professional development, resources, or support is needed to **improve consortium performance** on recruitment, retention and training of CTE professionals

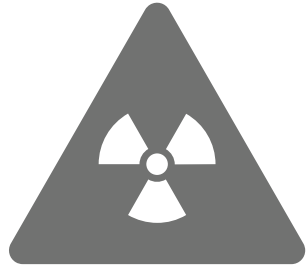
CLNA Element #5



Progress towards equal access to CTE programs for all students

- ✓ Strengths and gaps were identified by our needs assessment regarding **equal access to CTE programs for all students**
- ✓ Priorities regarding equal access for all students were uncovered in the needs assessment
- ✓ New and/or modified policies, activities, or structures must be developed and implemented
- ✓ Professional development, resources, or support is needed to improve equal access to CTE programs for all students

CLNA Element #6



Alignment to Labor Market
Information (LMI)

- ✓ Strengths and gaps were identified by your needs assessment **regarding Labor Market Information (LMI)**
- ✓ Industries and occupations are projected to grow the most in my local area
- ✓ New and/or modified policies, activities, or structures must be developed and implemented in response to the Labor Market Information (LMI)
- ✓ Professional development, resources, or support is needed to improve data driven decision-making using Labor Market Information (LMI)

CLNA → Local Application

- CLNA Upload & Core Indicator Reports
- Performance targets aligned with State Determined Levels of Performance (SDLPs)
- Perkins V Section 123: Program Improvement Plan (PIP)

Purpose: Continuous improvement and meeting students and industry needs.

- Fails to implement the required improvement plan;
- Makes no improvement within one year of implementing the improvement plan; or
- Fails to meet at least 90 percent of a performance for the same performance indicator two years in a row.

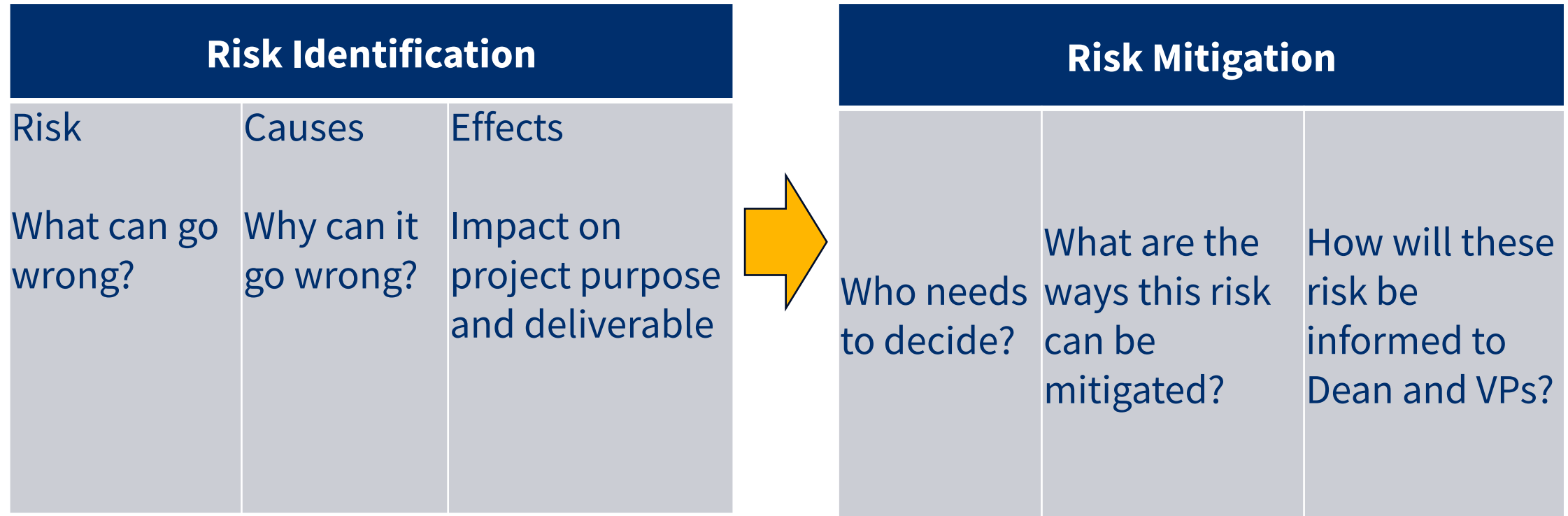
- The PIP must include:
 - ✓ Brief description of the roots causes from the analysis, including the identified missed 90% threshold.
 - ✓ The disaggregated categories of students for which there were quantifiable disparities or gaps in performance compared to all students or any other category of students.
 - ✓ An analysis of performance disparities or gaps.
 - ✓ The action steps which will be implemented, beginning in the current program year, to improve core indicator performance.
 - ✓ A timeline for completing each action and staff member(s) who will be responsible for each step.

CLNA → Local Application (continued...)

- Narrative Responses:
 - CTE Course Offerings and Activities
 - Partnerships with Local Workforce Development Agencies
 - Support for Students from Special Population Groups
 - Work-based Learning Opportunities
 - Dual or Concurrent Enrollment
 - Professional Development
 - Core Indicator Achievement
 - Develop, Implement, and Share Local Evaluations
- Goals and Metrics (Alignment to Vision 2030)
- A Detailed Budget Proposal
 - Preliminary Allocations
- Budget Modifications
 - To be submitted for approval via email to your regional monitor when revisions **exceed 10 percent** of a district's total allocation.
 - Must include program object code, the original budget, the proposed revised budget, and the justification.
 - Equipment and capital outlay expenditures must be reasonable, project aligned, and compliant with federal regulations (2 CFR §200.439).
 - All purchases must follow local procurement policies and receive prior approval when required.

Risk Assessing

Risk Identification and Mitigation



Risk Factor Table

- Resource:
[2025 Monitoring and Technical Assistance Manual: California Postsecondary Strengthening Career and Technical Education for the 21st Century Act \(Perkins V\)](#)

Risk Factor
Recipients whose single audit reports have identified problems with costs, lack of controls, or a system to identify costs charged to the grant/allocation.
Recipients that failed to meet deadlines in submitting applications, expenditure reports, or final claims (15 days after due date).
Recipients that have not met their negotiated performance measures (below the 90% threshold).
Recipients that fail to use a significant portion of their grant/allocation funding (at least 25 % by second quarter due date).
New district staff with little or no experience in managing the grant/allocation (recipients where persons in the coordinator role have changed will be viewed as new recipients).
Recipients that have revamped information systems or changed accounting rules/methods.
Recipients that receive over \$250,000 in grant/allocation funds.

Perkins Master Key Dates (July 1, 2026-June 30, 2027)

July-September	January-March
<ul style="list-style-type: none"> • Grant year begins • Quarter 4 Fiscal Report (Prev. fiscal year): <ul style="list-style-type: none"> ○ Due from District: July 15th ○ Reimbursements to be processed: Goal date of July 31st • Final Report (Prev. fiscal year): <ul style="list-style-type: none"> ○ Due from District: September 30th ○ Reimbursements to be processed: Goal date of October 15th 	<ul style="list-style-type: none"> • Headcount Certifications Open/Closed (TBA) • Quarter 2 Fiscal Report: <ul style="list-style-type: none"> ○ Due from District: January 15th ○ Reimbursements to be processed: Goal date of January 31st
October-December	April-June
<ul style="list-style-type: none"> • Quarter 1 Fiscal Report: <ul style="list-style-type: none"> ○ Due from District: October 15th ○ MIS VTEA Data Due (Perkins SV File) ○ Reimbursements to be processed: : Goal date of October 31st 	<ul style="list-style-type: none"> • Quarter 3 Fiscal Report: <ul style="list-style-type: none"> ○ Due from District: April 15th ○ Reimbursements to be processed: April 30th • Local Application/CLNA: <ul style="list-style-type: none"> ○ Due from District: May 29th ○ All applications are substantially approved: Goal date of July 1st

Quick Poll

What is your biggest fiscal pain point for your programs?

Perkins V Interactive Scenarios

Scenario 1 — The ‘We Need It Now’ Equipment Rush

A department identifies an opportunity to purchase high-cost instructional equipment before prices increase or availability disappears. While the equipment would modernize instruction and support workforce alignment, the request comes with limited lead time and incomplete documentation. The group must decide whether Perkins V funds can be used responsibly under these conditions and what evidence is required to justify expedited procurement.

To discuss:

- the tasks you would need to complete;
- which resources you would need to support your decision and rationale; and,
- a RACI chart (Responsible, Accountable, Consulted, Informed)

Scenario 2 — The Student Supplies Gray Area

Faculty propose using Perkins V funds to purchase student supplies that may blur the line between instructional materials and personal benefit. Some students cannot afford the required items, raising legitimate equity concerns. The team must assess allowability, consistency with Perkins guidance, and how to document that the purchase directly supports CTE program quality rather than replacing personal responsibility.

To discuss:

- the tasks you would need to complete;
- which resources you would need to support your decision and rationale; and,
- a RACI chart (Responsible, Accountable, Consulted, Informed)

Scenario 3 — The Audit-Readiness Red Flag

During a routine internal review, staff discover that a previously approved Perkins V expenditure lacks sufficient documentation or clear alignment to the CLNA. Although the purchase has already been made, concerns arise about audit risk and compliance. Participants must determine corrective actions, documentation strategies, and process improvements to prevent future findings.

To discuss:

- the tasks you would need to complete;
- which resources you would need to support your decision and rationale; and,
- a RACI chart (Responsible, Accountable, Consulted, Informed)

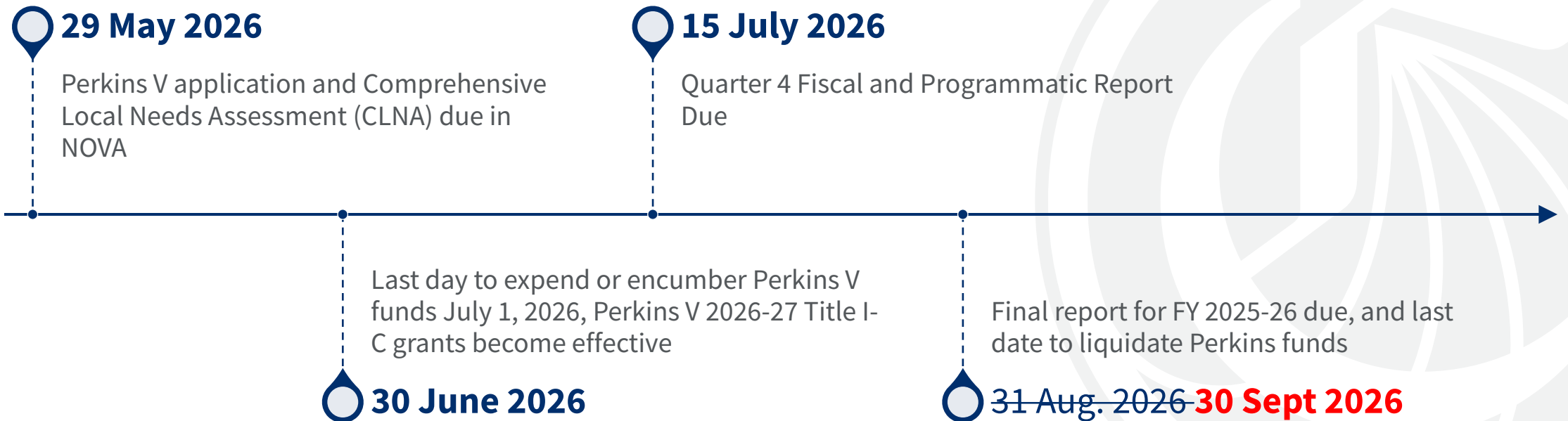
Action Planning

Think back to your biggest fiscal pain point you shared at the beginning...

Develop one concrete action for your district to complete within the next 30 days using the SMART goal strategy

(Specific, Measurable, Achievable, Relevant/Realistic, Time-based).

Local Application Key Dates



Perkins V Website Updates

Home — About Us — Chancellor's Office — Divisions — Workforce & Economic Development — **Strengthening Career and Technical Education for the 21st Century Act (Perkins V)**

Strengthening Career and Technical Education for the 21st Century Act (Perkins V)

The Strengthening Career and Technical Education for the 21st Century Act (Perkins V) was signed into law on July 31, 2018. The law reauthorizes and updates the Carl D. Perkins Career and Technical Education Act of 2006 to ensure career and technical education (CTE) programs meet the demands of the twenty-first-century economy. Perkins V represents an important opportunity to expand opportunities for every student to explore, choose, and follow career and technical education programs of study and career pathways to earn credentials of value.

In 2019, The [California Workforce Pathways Joint Advisory Committee](#) developed the Federal Perkins V State Plan which identified a wide-ranging effort to create a world-class CTE system that can strengthen education and workforce preparation available to all Californians.

Strengthening Career and Technical Education for the 21st Century Act (Perkins V)

Perkins IV

Archived Memos and Additional Resources

Resource Center

Guidance +

Perkins Title I-B State Leadership +

Perkins Title I-C Local Assistance +

Perkins Requests For Applications +

Presentations and Frequently Asked Questions +

Additional Resources +

Methods of Administration (MOA) +

Non Discrimination Statement +

Questions?





California Community Colleges

Thank you!

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