U.S. Department of Education
Office of Career Technical and Adult Education (OCTAE)

PERKINS
DISCRETIONARY GRANT PERFORMANCE REPORT

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INTRODUCTION

This document contains the U.S. Department of Education (Department), Office of Career Technical and Adult Education's (OCTAE's) Perkins Discretionary Grant Performance Report. OCTAE's Division of Academic and Technical Education (DATE) administers discretionary grants to states, local education agencies, community and tribal colleges, and other public or private nonprofit institutions that offer career and technical education programs. The Perkins Discretionary Grant Performance Report is a generic, single reporting instrument that combines all of the reporting requirements referenced below. It is designed to be used by all OCTAE-DATE discretionary grant recipients for annual and final performance/financial reporting, as well as quarterly and semi-annual performance/financial reporting, if such reports are required by a given grant program. The Perkins Discretionary Grant Performance Report must be submitted electronically via the Department's Perkins Web Portal at Perkins.ed.gov.

The Education Department General Administrative Regulations (EDGAR) set forth the reporting requirements for discretionary grant recipients in 34 CFR 74.51, 74.52, 75.118, 75.253, 75.590, 75.720, and 80.40. EDGAR requires discretionary grant recipients to submit an annual and final performance report that describes: a) the recipient's progress in achieving the objectives in its approved application; b) the effectiveness of the project in meeting the purposes of the program, and c) the effect of the project on participants being served by the project (34 CFR 75.590). EDGAR also requires financial status reporting but, as with performance reporting, allows the Department to determine the frequency of reporting for each project or program, considering the size and complexity of the particular project or program. Discretionary grant recipients also are required to report on their progress towards meeting the performance measures established for the grant program and any project-specific performance measures that were included in their approved grant application.

This document has three sections. Section I contains general instructions and reporting requirements for the Perkins Discretionary Grant Performance Report submission. Section II provides a checklist to assist the grant recipient in tracking the required report forms that must be included in different types of reports. Section III contains the Perkins Discretionary Grant Performance Report instrument and instructions. The instrument is divided into five parts: Cover Sheet and Executive Summary; Part A: GPRA Performance Measures; Part B: Project Objectives and Project-Specific Performance Measures; Part C: Additional Information; and Part D: Budget Information. Specific instructions are provided for each part to help OCTAE-DATE discretionary grant recipients prepare and submit complete, accurate, and timely reports, thereby meeting their reporting responsibilities to the Department.

I. GENERAL INSTRUCTIONS AND REPORTING REQUIREMENTS

A. Submission Deadlines

Because the Perkins Discretionary Grant Performance Report is designed to be used by all OCTAE-DATE discretionary grant recipients for different discretionary grant programs and for different kinds of reporting (quarterly, semi-annual, annual, and final), actual calendar submission deadlines will depend on the discretionary program under which the grant recipient has been funded and on the type of report being submitted. As a general rule, however, quarterly and semi-annual reports are due 30 days after the reporting period, and final performance reports are due 90 days after the expiration of the award. The submission deadline for annual performance reports would depend on whether the discretionary grant award is a continuation grant award with multiple budget periods or a multiple-year award with only one budget period. OCTAE discretionary grant recipients will be notified by their OCTAE Discretionary Program Manager (Program Manager) each year of submission deadlines for the different reports required under that discretionary program.

B. Submission Information

Each discretionary grant recipient will submit the Perkins Discretionary Grant Performance Report electronically via the Department's Perkins Web Portal at Perkins.ed.gov. This Web site allows a grant recipient to complete its report using Web-based forms and to certify to the accuracy and completeness of its submission using electronic Personal Identification Numbers (PINs) supplied to the discretionary grant recipient by the Department. The grant recipient's project director must use one PIN to certify and sign the entire Perkins Discretionary Grant Performance Report submission. The authorized official responsible for certifying and signing budget expenditure reports must use another PIN. It is important to note that the use of the PINs to certify and sign the Perkins Discretionary Grant Performance Report and budget expenditure reports is the same as certifying the documents with a hand-written signature by the responsible official. Officials are responsible for protecting the confidentiality of their PIN and for any use of their PIN by another individual.

C. Requests for Extensions

The Department may grant to a discretionary grant recipient a brief extension to the submission deadline for the Perkins Discretionary Grant Performance Report upon receipt of a justified request. The request must indicate the specific factors necessitating the grant recipient's extension and the reasons the grant recipient did not become aware of these factors to ensure that its submission was timely. An extension must be requested via e-mail to the Program Manager.

D. Amended Perkins Discretionary Grant Performance Report Submissions

The Department may permit a grant recipient to file an amended Perkins Discretionary Grant Performance Report upon receipt of a justified request, indicating the specific factors necessitating the grant recipient's revision of its report and the reasons the grant recipient did not become aware

of these factors in time to ensure its original submission was complete, accurate, and timely. An extension must be requested via e-mail to the Program Manager.

Once a grant recipient has received OCTAE approval, the grant recipient may submit its amended report electronically via the Department's Perkins Web Portal at Perkins.ed.gov. The grant recipient's project director must use their PIN to certify and sign the amended report. If budget information has been amended, the authorized official responsible for certifying and signing budgets and expenditure reports must use their pin to certify and sign that section of the amended report.

E.   Further Information

Questions regarding the Perkins Discretionary Grant Performance Report instrument and reporting requirements should be directed to the grant recipient's Program Manager as indicated in Block 3 of the grant recipient's Grant Award Notification.

II. CHECKLIST OF REQUIRED REPORT FORMS

Form Name or Items Required	(For Grant Recipient Use) Check When Completed				
Because reporting requirements differ for different programs and for different types of reports, check with your OCTAE Discretionary Program Manager for more detailed instructions as to what must be included in each report.	Qrtly Report	Semi-Annual Report	Annual Perf. Report	Final Perf. Report	Complete Data Report*
REPORT COVER SHEET					
• Cover Sheet					
• Executive Summary					
PART A: GPRA PERFORMANCE MEASURES					
• Student Enrollment Form					
• GPRA Performance Measure #1 Data Table					
• GPRA Performance Measure #2 Data Table					
• GPRA Performance Measure #3 Data Table *(add measures/data tables as necessary)*					
•					
PART B: PROJECT OBJECTIVES AND PROJECT-SPECIFIC PERFORMANCE MEASURES					
• Project Objective #1					
• Project Objective #2					
• Project Objective #3 *(add objectives as necessary)*					
•					
PART C: ADDITIONAL INFORMATION					
• Additional Information					
PART D: BUDGET INFORMATION					
• Budget Summary and Narrative					
• Budget Expenditure Report					

* Some programs may require grant recipients to submit a Complete Data Report of GPRA performance measures if complete GPRA data was not available by the deadline for submission of the Annual Performance Report. Your Program Manager will provide further instructions if your program requires the submission of a Complete Data Report.

III.

PERKINS
DISCRETIONARY GRANT PERFORMANCE REPORT

INSTRUMENT AND INSTRUCTIONS

U.S. Department of Education
Office of Career Technical and Adult Education
PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT COVER SHEET
Check only one box per Instructions.

⬜Quarterly Performance Report   ⬜Semi-Annual Performance Report   ⬜Annual Performance Report
⬜Final Performance Report   ⬜Complete Data Report

General Information

1. PR/Award #: _____

    (Block 5 of the Grant Award Notification.)

2. Project Title: _____

    (Enter the same title as on the approved application.)

3. Grant Recipient Name: _____

    (Block 1 of the Grant Award Notification.)

4. Grant Recipient Address: (*See Instructions.*)

5. Project Director Name: _____ Title: _____

    Phone #: (   ) _____-_____   Ext: _____   Fax#: (   ) _____-_____

    Email Address: _____

Reporting Period

6. Reporting Period: From: _____/_____/_____   To: _____/_____/_____   *(mm/dd/yyyy)*

Budget Expenditures *(To be completed by your Business Office. See instructions.)*

7. Budget Expenditures

	Federal Grant Funds	**Non-Federal Funds** *(Match/Cost Share)*
a. Current Reporting Period		
b. Entire Project Period *(For Final Performance Reports only)*		

Indirect Cost Information *(To be completed by your Business Office. See instructions.)*

8. Indirect Cost Information

    a. Are you claiming indirect costs under this grant?   __Yes   __No

    b. If yes, do you have an Indirect Cost rate Agreement approved by the Federal Government?   __Yes   __No

    c. If yes, provide the following information:

      Period covered by the Indirect Cost Rate Agreement: From: _____/_____/_____ To: _____/_____/_____ *(mm/dd/yyyy)*

      Approving Federal agency: __ED   __Other *(Please Specify)*:_____

      Type of Rate: __Provisional __Final __Other *(Please Specify)*:_____

    d. For Restricted Rate Programs (check one) – Are you using a restricted indirect cost rate that:

      __Is included in your approved Indirect Cost Rate Agreement?

      __Complies with 34 CFR 76.564(c)(2)?

Human Subjects *(See instructions.)*

9. Annual Certification of Institutional Review Board (IRB) Approval?   __Yes   __No   __N/A

GPRA Performance Measures Status and Certification *(See instructions.)*

10. Performance measures status

    a. Are complete data on performance measures for the current budget period included in this report?   __Yes __No

    b. If "No", when will you submit complete data to the Department? _____/_____/_____ *(mm/dd/yyyy)*

11. I certify to the best of my knowledge and belief that this report, consisting of performance data, narrative performance information, and budget information, is accurate and complete, and that the report fully discloses all known weaknesses concerning the accuracy, reliability, and completeness of the data. I understand that the use of the Personal Identification Number (PIN) supplied to me by the Department to certify and submit this report is the same as certifying and signing the document with a hand-written signature.

Name of Authorized Representative:	Title:
Signature or PIN:	Date:

U.S. Department of Education
Office of Career Technical and Adult Education
PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT EXECUTIVE SUMMARY

| **Grant Recipient:** |
| **Reporting Period:** |
| **Program:** |
| **(See Instructions.)** |
| |

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT COVER SHEET and EXECUTIVE SUMMARY

At the top of the Cover Sheet, check the type of report being submitted. Complete the Cover Sheet with the appropriate information for that type of report, per these instructions and/or instructions from your OCTAE Discretionary Program Manager (Program Manager). Instructions for items 1, 2, and 3 are included on the Cover Sheet. Instructions for items 4 through 11 are included below.

4. Grant Recipient Address

Enter the address that is listed in Block 1 of the Grant Award Notification (GAN). If your address has changed you may update your address via the Perkins Web Portal at Perkins.ed.gov.

5. Project Director

Enter all the contact information for your approved Project Director listed in Block 3 of the GAN. Please note that changing the approved Project Director requires prior approval from the Department and may only be requested for a grant whose performance period has not ended.

6. Reporting Period Information

Enter the reporting period for the type of report being submitted, as directed by your Program Manager.

7. Budget Expenditures

DO NOT complete this section if you are submitting a Complete Data Report.

The budget expenditure information requested in items 7a -7b must be completed by your Business Office, by an authorized individual responsible for certifying and signing budget expenditure reports for your grant.

For the purpose of this report, the term "Budget Expenditures" means allowable grant obligations incurred during the periods specified. (See EDGAR 34 CFR 74.2, 75.703, 75.707, and 80.3, as applicable.)

For budget expenditures made with <u>Federal grant funds</u>, you must provide an explanation in Part C.a. if you have not drawn down funds from the Department's G5 System to pay for these budget expenditures being reported.

If you are required to provide <u>non-Federal funds</u> or resources for the grant because the funding program has a statutory matching or cost sharing requirement or you voluntarily committed to providing non-Federal funds or resources in your approved grant application, you must complete the Non-Federal Funds (Match/Cost Share) column in items 7a – 7b, as applicable. You are encouraged to review the following information regarding allowable cost sharing/matching contributions:

- The funding program's statute and regulations (if any);

- The Department's general cost sharing and matching regulations, which include specific limitations, in 34 CFR 74.23, applicable to non-governmental entities, and 34 CFR 80,24, applicable to governments, and the applicable Office of Management and Budget (OMB) cost principles for your entity type

regarding donations, capital assets, depreciation and use allowances. OMB cost principle circulars are available on OMB's website at: http://www.whitehouse.gov/omb/circulars/index.html.

Note: DO NOT complete the Non-Federal Funds (Match/Cost Share) column if you are submitting a Quarterly or Semi-Annual Performance Report or a Complete Data Report.

8. Indirect Cost Information

DO NOT complete this section if you are submitting a Quarterly or Semi-Annual Performance Report or a Complete Data Report.

The indirect cost information requested in items 8a -8d must be completed by your Business Office, by an authorized individual responsible for certifying and signing budgets and expenditure reports for your grant.

For Annual and Final Performance Reports:

- Item 8a—Please check "Yes" or "No" to indicate whether or not you are claiming indirect costs under the grant.

- Item 8b—If you checked "Yes" in item 8a, please indicate whether or not your agency/organization has an Indirect Cost Rate Agreement that was approved by the Federal Government.

- Item 8c—If you checked "Yes" in item 8b, please indicate the beginning and ending dates covered by the Indirect Cost Rate Agreement. In addition, indicate whether ED or another Federal agency (Other) issued the approved agreement. If you checked "Other", specify the name of the Federal agency that issued the approved agreement. Check the appropriate box to indicate the type of indirect cost rate that you have—Provisional, Final, or Other. If you check "Other", please specify the type of indirect cost rate.

- Item 8d—For grants under Restricted Rate Programs (see EDGAR, 34 CFR 75.563), please indicate whether you are using a restricted indirect cost rate that is included on your approved Indirect Cost Rate Agreement or whether you are using a restricted indirect cost rate that complies with 34 CFR 76.564(c)(2). Check only one response. *Note:* State or Local government agencies may not use the provision for a restricted indirect cost rate specified in EDGAR 34CFR 76.564(c)(2). Leave blank, if this item is not applicable.

9. Human Subjects (Annual Institutional Review Board (IRB) Certification)

This section must be completed for Annual Performance Reports only.

If Attachment HS1, Continuing IRB Reviews, was attached to the GAN, annual IRB certification is required for your grant. Check "Yes" and attach a copy of the IRB certification for the current reporting period to the Annual Performance Report. Check "No" if annual IRB certification is required but you have not attached a copy of the IRB certification to the Annual Performance Report. Indicate the reason why the IRB certification is not attached (e.g., the research has been completed) in Part C.a. of the report.

Check "N/A" if Attachment HS1 was not attached to the GAN.

10. Performance Measures Status

Do NOT complete this section if you are submitting a Quarterly or Semi-Annual Performance Report.

For Annual Performance Reports:

- Item 10a—Please check "Yes" or "No" to indicate whether complete data (i.e., all of the data that you anticipate will be collected) on performance measures for the current budget period are included in this report.

- Item 10b—If you checked "No" in item 10a, indicate the date when you will submit complete data to the Department.

- Complete data must be submitted for any performance measures established by the Department for the grant program and for any additional performance measures that were included in your approved grant application.

- If complete data on performance measures for the entire budget period have not been obtained when you submit your Annual Performance Report, please submit all the available data for the budget period to date, unless instructed otherwise by your Program Manager. Be sure to check the "Partial Data" box in Part A and B of the report for each performance measure for which you do not have complete data.

For Final Performance Reports:

- You must check "Yes" in item 10a. Complete data on performance measures for the final budget period must be submitted with the final performance report.

- Leave item 10b blank.

11. Certification

The grant recipient's project director must sign the certification for the Perkins Discretionary Grant Performance Report submission. If the grant recipient has any known internal control weaknesses (as disclosed through audits or other reviews), this information must be disclosed in Section C.a. of the report, along with steps taken to rectify the weaknesses.

Executive Summary

Do NOT complete this section if you are submitting a Quarterly Performance Report, Semi-Annual Performance Report, or Complete Data Report.

For Annual and Final Performance Reports:

- Provide a 2-3 page synopsis of project activities and accomplishments during the reporting period.

- Include specific challenges that may have been encountered during the reporting period and steps undertaken to address them.

- *Note:* The Executive Summary for the Final Performance Report must cover the *entire* project period.

PART A: GPRA PERFORMANCE MEASURES DATA

STUDENT ENROLLMENT FORM

Grant Recipient:

Reporting Period:

Program:

PROGRAM PARTICIPANTS

☐ Partial Data   ☐ Complete Data

Code: Line	Population	Number of Secondary Students	Number of Postsecondary Students	Number of Adult Students
1	**GRAND TOTAL**			
2	**GENDER**			
3	Male			
4	Female			

Additional Information:

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT

STUDENT ENROLLMENT FORM

Each grant recipient must provide an unduplicated count of program participants and must disaggregate participant data by gender.

Code:

In the upper left column of the form, enter the program code as directed by your Program Manager.

Cells:

Each cell on the Student Enrollment Form must contain a digit, a "0" (zero), an NP (not provided), or an NA. A "0" indicates that there are no students in the cell. An NP means that the grant recipient was unable to obtain the data, in which case, the grant recipient must explain why it was unable to obtain the data in the Additional Information text box. Please note that an NP will be counted as a "0" in aggregated totals.

Additional Information

Enter any additional information you deem necessary to explain the student enrollment data being reported.

GPRA PERFORMANCE MEASURES DATA TABLES

<table>
<tr><td colspan="7">Grant Recipient:
Reporting Period:
Program:</td></tr>
<tr><td>Code

Line</td><td>Performance Measure: <i>(See instructions)</i>

☐ Partial Data   ☐ Complete Data</td><td>Number of Students in the Numerator</td><td>Number of Students in the Denominator</td><td>Target in Original Application</td><td>Actual</td><td>Met/Not Met</td></tr>
<tr><td>1</td><td>GRAND TOTAL</td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

Does this performance measure require a percentage?   __Yes __No

Does this performance measure require a raw number?   __Yes __No

<table>
<tr><td>Additional Information:</td></tr>
<tr><td>

</td></tr>
</table>

Add a Measure?   __Yes __No

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT
GPRA PERFORMANCE MEASURES DATA TABLES

The 1993 Government Performance and Results Act (GPRA) holds federal agencies accountable for using resources wisely and achieving program results. GPRA seeks to shift the focus of government decision making and accountability away from a preoccupation with the activities that are undertaken to a focus on the results of those activities, such as real gains in program quality, student outcomes, etc. GPRA requires agencies to develop plans for what they intend to accomplish, measure how well they are doing, make appropriate decisions based on the information they have gathered, and communicate information about their performance to Congress and to the public. In response to GPRA, the U.S. Department of Education has identified specific performance measures for each of its education programs that must be used to evaluate the overall effectiveness of those programs.

Code:

In the upper left column of the form, enter the code for each GPRA performance measure as directed by your Program Manager.

Performance Measure:

The *Federal Register* Notice Inviting Applications for New Awards for the discretionary program under which your grant was funded contained the GPRA performance measures for which all grant recipients funded under that program are required to collect and report data to the Department. You must collect and report performance data for each GPRA performance measure established for the discretionary program under which your grant was funded, using the measurement definition that was published in the *Federal Register* Notice Inviting Applications. You must use the GPRA Performance Measures Data Tables to report your GPRA performance data to the Department.

Enter only one GPRA performance measure per row, following instructions provided by your Program Manager.

- **Partial/Complete Data:** Indicate whether you are submitting Partial or Complete Data. *Note:* Complete Data must be checked for Complete Data Reports and for Final Performance Reports.

- **Target and Actual Performance Data:** In the Target and Actual columns, provide the target you established in your approved grant application for each performance measure and provide actual performance data to demonstrate your progress towards meeting or exceeding the target. If the Department has approved revised targets for a GPRA performance measure, the revised target should be used when entering data.

- **Percentage:** If a performance measure is stated in terms of a percentage (e.g., percentage of students that attain proficiency), check "Yes" under the question: Does this performance measure require a percentage? Check "No" under the question: Does this performance measure require a raw number? Enter the target and actual performance data as a percentage. Enter a single number in the Numerator and Denominator columns, following the measurement definition that was established for that performance measure as published in the *Federal Register* Notice Inviting Applications. Provide the measurement definition for that performance measure in the block entitled, Explanation of Progress.

- **Raw Number:** If a performance measure is stated in terms of a single number (e.g., the number of workshops that will be conducted or the number of students that will be served), check "Yes" under the question: Does this performance measure require a raw number? Check "No" under the question: Does this performance measure require a percentage? Enter the target and actual performance data as a single number and leave the Numerator and Denominator columns blank.

Additional Information:

Provide an explanation for the data being reported, including the measurement definition that was used to collect and report data for that performance measure. If you are missing data, explain why the data was not reported and when you anticipate being able to report the missing data. Include relevant qualitative data, if any, for the performance measure.

Add a Measure:

If multiple GPRA performance measures were established for your grant program, check "Yes" under the question: Add a Measure? This will open additional GPRA Performance Measures Data Tables as needed. You must submit a GPRA Performance Measures Data Table for each GPRA performance measure required under the funding program.

PART B: PROJECT OBJECTIVES AND PROJECT-SPECIFIC PERFORMANCE MEASURES
PROJECT OBJECTIVES AND PROJECT-SPECIFIC PERFORMANCE MEASURES DATA TABLES

Grant Recipient:
Reporting Period:
Program:
1. Project Objective:

1.a. Performance Measure: Partial Data Complete Data	Number of Students in the Numerator	Number of Students in the Denominator	Target in Original Application	Actual	Met/Not Met
TOTAL					

Does this performance measure require a percentage?   __Yes __No

Does this performance measure require a raw number?   __Yes __No

Add a Measure?   __Yes __No   Add a Project Objective?   __Yes __No

1.b. Performance Measure: Partial Data Complete Data	Number of Students in the Numerator	Number of Students in the Denominator	Target in Original Application	Actual	Met/Not Met
TOTAL					

Does this performance measure require a percentage?   __Yes __No

Does this performance measure require a raw number?   __Yes __No

Add a Measure?   __Yes __No   Add a Project Objective?   __Yes __No

1. Explanation of Progress

1.1.   What activities did you conduct during the reporting period that relate to this project objective?

1.2.   What preliminary findings or outcomes can you report for the reporting period that relate to this project objective?

1.3.   What challenges occurred during the reporting period that relate to this project objective?

2. Project Objective:

2.a. Performance Measure:	Number of Students in the Numerator	Number of Students in the Denominator	Target in Original Application	Actual	Met/Not Met
☐ Partial Data ☐ Complete Data					
TOTAL					

Does this performance measure require a percentage?   __Yes __No

Does this performance measure require a raw number?   __Yes __No

Add a Measure?   __Yes __No   **Add a Project Objective?   __Yes __No**

2.b. Performance Measure:	Number of Students in the Numerator	Number of Students in the Denominator	Target in Original Application	Actual	Met/Not Met
☐ Partial Data ☐ Complete Data					
TOTAL					

Does this performance measure require a percentage?   __Yes __No

Does this performance measure require a raw number?   __Yes __No

Add a Measure?   __Yes __No   **Add a Project Objective?   __Yes __No**

2. Explanation of Progress

2.1 What activities did you conduct during the reporting period that relate to this project objective?

2.2. What preliminary findings or outcomes can you report for the reporting period that relate to this project objective?

2.3. What challenges occurred during the reporting period that relate to this project objective?

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT PROJECT OBJECTIVES AND PROJECT-SPECIFIC PERFORMANCE MEASURES DATA TABLES

Project Objective:

Enter each project objective that was included in your original grant application. If you revised any of your project objectives as a result of discussions with the Department, enter the revised approved project objectives rather than the original. If you added any project objectives as a result of discussions with the Department, enter those project objectives as well.

Enter only one project objective per row and number the project objectives sequentially, i.e., 1, 2, 3, etc.

Performance Measure:

Project-specific performance measures are non-GPRA performance measures that you, the grant recipient, established in your approved original grant application to meet your project objectives. For each project objective, enter each associated project-specific performance measure that you have established for that project objective. You may have established multiple project-specific performance measures for each project objective. Enter only one project-specific performance measure per row. Each project-specific performance measure that is associated with a particular project objective should be labeled using an alpha indicator. For example, the first performance measure for project objective "1" should be labeled "1.a", the second performance measure for project objective "1" should be labeled "1.b", etc.

- **Partial/Complete Data:** Indicate whether you are submitting Partial or Complete Data. NOTE: Complete Data must be checked for Complete Data Reports and for Final Performance Reports.

- **Target and Actual Performance Data:** In the Target and Actual columns, provide the target you established for each performance measure and provide actual performance data to demonstrate your progress towards meeting or exceeding the target. If the Department has approved revised targets for a project-specific performance measure, the revised target should be used when entering data.

- **Percentage:** If a performance measure is stated in terms of a percentage (e.g., percentage of students that attain proficiency), check "Yes" under the question: Does this performance measure require a percentage? Check "No" under the question: Does this performance measure require a raw number? Enter the target and actual performance data as a percentage. Enter a single number in the Numerator and Denominator columns, following the measurement definition that you, the grant recipient, established in your approved original grant application for that performance measure. Provide the measurement definition that you established for that performance measure in the block entitled, Explanation of Progress.

- **Raw Number:** If a performance measure is stated in terms of a single number (e.g., the number of workshops that will be conducted or the number of students that will be served), check "Yes" under the question: Does this performance measure require a raw number? Check "No" under the question: Does this performance measure require a percentage? Enter the target and actual performance data as a single number and leave the Numerator and Denominator columns blank.

- **Qualitative data:** If the collection of quantitative data is not appropriate for a particular performance measure, leave the columns blank and provide an explanation and any relevant qualitative data for the performance measure in the text boxes under Explanation of Progress.

Explanation of Progress:

For each project objective, describe the activities conducted, findings or outcomes, and challenges encountered during the reporting period. Provide an explanation for the data being reported, including the measurement definition for each performance measure listed under each project objective. If you are missing data, explain why the data was not reported and when you anticipate being able to report the missing data.

Add a Measure:

If you wish to include more than one performance measure under a given project objective, check "Yes" under the question: Add a Measure? This will open additional Project-Specific Performance Measure Data boxes.

Add a Project Objective:

If you established multiple project objectives for your project, check "Yes" under the question: Add a Project Objective? This will open additional Project Objective boxes.

PART C: ADDITIONAL INFORMATION

ADDITIONAL INFORMATION
Grant Recipient: **Reporting Period:** **Program:**
a. What additional information do you wish to report for this reporting period?
b. What questions or concerns do you wish to share with your project officer?
c. In what areas would you like to receive technical assistance?
d. What is your proposed plan for the next project period? *(For Annual Performance Reports only.)*

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT
ADDITIONAL INFORMATION

Grant recipients should address each question in Part C. You may use bullets, tables, and charts as needed to provide the necessary information.

For Annual Performance Reports:

Part C.d. -- Proposed plan for the next project period:

Provide a brief description of your proposed project activities for the next project period. If you propose to institute a new activity, identify the approved project objective that it would support. If you propose to add a new Project Objective, provide a justification as to why the new objective is necessary to the success of the project and explain how it falls within the scope of your approved grant application. NOTE: You may not implement a new activity or project objective without the prior approval of your OCTAE Program Man

Part C.a. -- Cover Sheet Explanations:

- **Budget Expenditures made with Federal grant funds:** If you have not drawn down funds from the Department's G5 System to pay for the Federal budget expenditures being reported in 7a. of the Cover Sheet, you must provide an explanation in Part C.a.

- **Human Subjects** *(For Annual Performance Reports only)***:** For Annual Performance Reports only, if annual IRB certification is required for your grant but you did not attach a copy of the IRB certification to your Annual Performance Report, provide an explanation in Part C.a. as to why the IRB certification is not attached.

- **Certification:** If your grant has any known internal control weaknesses (as disclosed through audits or other reviews), you must disclose this information in Part C.a. and describe the steps being taken to rectify the weaknesses.

Part C.d. -- Proposed plan for the next project period *(For Annual Performance Reports only)***:**

Provide a brief description of your proposed project activities for the next project period. If you propose to institute a new activity, identify the approved Project Objective that the new activity would support. If you propose to add a new Project Objective, provide a justification for why the new objective is necessary to the success of the project and explain how it falls within the scope of your approved grant application. *NOTE: You may not implement a new activity or project objective without the prior approval of your Program Manager.*

PART D: BUDGET INFORMATION
BUDGET SUMMARY AND NARRATIVE FORM

Grant Recipient:
Reporting Period:
Program:

BUDGET SUMMARY AND NARRATIVE
Check only one box per Instructions

☐ **Proposed Budget for Next Grant Year**   ☐ **Revised Budget for Current Budget Period**   ☐ **No Change**

Cost Category	**Federal Funds**	**Non-Federal Funds** *(Match/Cost Share)* **(if applicable)**	**Estimated Carryover Funds**	**Total**
1. Personnel				
2. Fringe Benefits				
3. Travel				
4. Equipment				
5. Supplies				
6. Contractual				
7. Construction				
8. Other				
9. Total Direct Costs *(lines 1-8)*				
10. Indirect Costs				
11. Training Stipends				
12. Total Costs *(lines 9-11)*				

Budget Narrative:

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT

BUDGET SUMMARY AND NARRATIVE FORM

Do NOT complete this form if you are submitting a Final Performance Report or Complete Data Report.

For Quarterly Performance Reports and Semi-Annual Performance Reports:

- Check the Revised Budget for Current Budget Period box if you are submitting a revised budget for the current budget period. Provide a complete revised budget.

- Under Budget Narrative, provide an explanation as to why the budget changes are necessary and a detailed justification for funds budgeted under each federal budget category.

- If you are required to provide <u>non-Federal funds</u> or resources for the grant because the funding program has a statutory matching or cost sharing requirement or you voluntarily committed to providing non-Federal funds or resources in your approved grant application, you must complete the Non-Federal Funds (Match/Cost Share) column.

- Check the No Change box if are not proposing any changes to your current budget. Leave the rest of the form blank.

For Annual Performance Reports:

- Check the Proposed Budget for Next Grant Year box and complete your proposed budget for the next grant year.

- Under Budget Narrative, provide a detailed justification for funds budgeted under each federal budget category.

- If you are required to provide <u>non-Federal funds</u> or resources for the grant because the funding program has a statutory matching or cost sharing requirement or you voluntarily committed to providing non-Federal funds or resources in your approved grant application, you must complete the Non-Federal Funds (Match/Cost Share) column.

BUDGET EXPENDITURE REPORT

Grant Recipient: **Reporting Period:** **Program:**			

Grant award:

Unobligated Federal funds:

	Federal Funds	Non-Federal Funds *(Match/Cost Share)* (if applicable)	Total Funds
1. Personnel			
2. Fringe Benefits			
3. Travel			
4. Equipment			
5. Supplies			
6. Contractual			
7. Construction			
8. Other			
9. Total Direct Costs *(lines 1-8)*			
10. Indirect Costs			
11. Training Stipends			
12. Total Costs			

Explanation:

I certify to the best of my knowledge and belief that this Expenditure Report is accurate and complete. I understand that the use of the Personal Identification Number (PIN) supplied to me by the Department to certify and submit this report is the same as certifying and signing the document with a hand-written signature.

Name of Authorized Representative:	Title:
Signature or PIN:	Date:

INSTRUCTIONS FOR THE PERKINS DISCRETIONARY GRANT PERFORMANCE REPORT
BUDGET EXPENDITURE REPORT

Do NOT complete this form if you are submitting a Complete Data Report.

Do NOT complete this form if you are submitting a Quarterly, Semi-Annual, or Annual Performance Report, unless you are given specific instructions to do so by your Program Manager.

For Final Performance Reports:

- **Reporting Period:** Enter the performance period of the grant as listed in Block 6 of the GAN.

- **Grant Award:** Enter the amount listed for the full performance period in Block 7 of the most recent GAN.

- **Federal Funds:** Enter the total amount of Federal funds expended under each budget category over the entire performance period.

- **Non-Federal Funds:** If you are required to provide <u>non-Federal funds</u> or resources for the grant because the funding program has a statutory matching or cost sharing requirement or you voluntarily committed to providing non-Federal funds or resources in your approved grant application, you must complete the Non-Federal Funds (Match/Cost Share) column.

- **Total Funds:** Enter the total funds expended under each budget category over the entire performance period.

- **Explanation:** Provide an explanation if: a) you did not meet the required or anticipated match/cost share for the grant; b) you have significantly higher or lower Federal budget expenditures in a given budget category than what was originally budgeted; c) you have not drawn down funds from the Department's G5 System to pay for the Federal budget expenditures being reported; or d) you have unobligated Federal funds at the end of the performance period.

- **Authorized Representative:** The Budget Expenditure Report must be completed by your Business Office, by an authorized individual responsible for certifying and signing budget expenditure reports for your grant.