

**Perkins Request Scoring Rubric  
2026-27**

The Perkins committee will use this rubric to score and rank all Perkins project requests.

<b>Criteria</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>
<b>Benefits special population students*</b>	Project has clearly stated outcomes of how it will benefit special population students.	Project will benefit special population students, but no clear outcomes.	Project vaguely benefits special population students.	No mention of special population students.
<b>Reduces student barriers</b>	Project has clearly stated outcomes of how it will reduce student barriers.	Project will reduce student barriers, but no clear outcomes.	Project vaguely reduces student barriers.	No mention of reducing student barriers.
<b>Work-based learning</b>	Project has clearly stated outcomes of how it will incorporate work-based learning.	Project could incorporate work-based learning but no clear outcomes.	Project vaguely discusses work-based learning.	No mention on how this project will incorporate work-based learning.
<b>Request form</b>	Form is detailed and thorough. It is easy to find all the necessary information.	Form is complete but lacking in detail.	Form is incomplete, missing important information and details.	Form was not completed.
	<b>6</b>	<b>4</b>	<b>2</b>	<b>0</b>
<b>Industry aligned and/or responsive to labor market</b>	Project has clearly stated outcomes of how it aligns with industry and/or labor market.	Project aligns to industry needs and/or labor market, but no clear outcomes.	Project vaguely responds to industry needs and/or labor market.	No mention of industry alignment or labor market.
	<b>3</b>	<b>0</b>		
<b>Comprehensive Local Needs Assessment (CLNA)</b>	Project aligns to the CLNA.	Project does not align to the CLNA.		

\***Special populations** are individuals with disabilities, from economically disadvantaged families, preparing for nontraditional fields by gender, single parents, single pregnant women, out-of-workforce individuals, English language learners, homeless, youth who are in or have aged out of the foster care system, or youth with a parent who is a member of the armed forces and is on active duty.

## Examples of Measurable Outcomes

<b>Project Type</b>	<b>Example</b>	<b>Measurable Outcome</b>
Career exploration/awareness	Field trip for CTE students to a regional employer.	After the field trip, 100% of participating students will be able to identify at least two career pathways related to their CTE program area, as measured by a post-trip reflection.
Industry certification exams	Reimbursement of testing fees to industry recognized certification exams	The proportion of CTE program students who take the exam by May 2027 will increase from 80% to 90%.
Personnel	Hiring a new faculty for a CTE program	The academic year enrollment of this CTE program will increase by 10 FTE in academic year 2026-27.
Professional development for CTE faculty, advisors	Dental Hygiene faculty attending the American Dental Hygienists' Association conference	Instructors will incorporate at least one new, evidence-based teaching strategy or curriculum enhancement into one of their courses by May 2027.
Purchase of instructional equipment, hardware, software*, technology*	Purchase of a bioquest simulated smokers lungs demonstration kit, SE-18 Resting ECG, & Ritter Manual Exam table for nursing students	The fall 2026 pass rate for the nursing quiz assessing these skills will increase from 75% to 80% in the NRS 100 course.
Student support for special populations**	Transportation and childcare costs	The fall-to-spring persistence rate of these students will increase from 70% to 85%.

# General Guidance for Perkins V Local Uses of Funds



- Allowable



- Allowable, but only under certain circumstances



- Not Allowable

Allowable?	Budget Item	Special Requirements or Additional Information
<input checked="" type="checkbox"/>	<b>ADMINISTRATION:</b> Administrative expenses are those expenses used for running the grant, not expenses related to providing direct grant services to students. Indirect costs are always administrative expenses.	May be used for indirect and direct administrative costs in a Perkins grant when, taken together, the amount does not exceed 5% of the total grant. The administrative cost categories (functions that should be considered as a direct administrative cost in calculating the 5% ceiling) are: <ul style="list-style-type: none"> <li>• Developing the local application.</li> <li>• Supervising local application activities.</li> <li>• Supervising Perkins-funded staff.</li> <li>• Ensuring compliance with applicable Federal laws.</li> <li>• Supporting and developing local data systems for Perkins (this does not include data collection and analysis).</li> <li>• Professional development for Perkins administrators</li> </ul>
<input checked="" type="checkbox"/>	<b>AUDIT SERVICES</b>	May not be used for audit services expenditures.
<input type="checkbox"/>	<b>CAREER TECH STUDENT ORGANIZATIONS:</b> Defined as organizations that serve students enrolled in career and technical education programs by engaging students in a variety of career development and leadership activities. The student organizations are assisted with Perkins V funds especially with respect to increasing the participation and success of students who are members of special populations.	<input checked="" type="checkbox"/> May be used for fees or dues for instructional CTE Memberships. <input checked="" type="checkbox"/> May not be used to transport students for career/vocational technical education student organization events. <input checked="" type="checkbox"/> May not be used for lodging, feeding, conveying, or furnishing transportation to conventions. <input checked="" type="checkbox"/> May not be used to purchase of supplies, jackets, and other effects for students' personal ownership. <input checked="" type="checkbox"/> May not be used for cost of non-instructional activities such as athletic, social, or recreational events. <input checked="" type="checkbox"/> May not be used to purchase food for banquets, award ceremonies, goodwill gestures, etc.
<input type="checkbox"/>	<b>CERTIFICATIONS</b>	<input checked="" type="checkbox"/> May not be used to pay for an individual certification exam or test (e.g., Microsoft Office Specialist Certification licensing, OSHA Construction Safety Certification). <input checked="" type="checkbox"/> May be used for certifications for students within a special population category with prior approval.
<input checked="" type="checkbox"/>	<b>COMMENCEMENT AND CONVOCATION COSTS</b>	May not be used for costs for commencement and convocation.

<input type="checkbox"/>	<b>COMPENSATION – FRINGE BENEFITS</b>	<input checked="" type="checkbox"/> May be used for fringe benefits as allowances and services provided by employers to their employees as compensation in addition to regular salaries, wages, and stipends.  <input checked="" type="checkbox"/> May not be used as prepaid debit and gift cards.
<input type="checkbox"/>	<b>CONFERENCES (SPONSORED OR HOSTED BY GRANTEE)</b>	<input checked="" type="checkbox"/> May be used for costs paid by the school as a sponsor or host may include the following: <ul style="list-style-type: none"> <li>• Rental of facilities</li> <li>• Speakers’ fees</li> <li>• Local transportation</li> <li>• Other items incidental to such conferences <i>unless</i> restricted by the grant</li> </ul> <input checked="" type="checkbox"/> May not be used as payments for food and/or beverages.
<input checked="" type="checkbox"/>	<b>ENTERTAINMENT</b>	May not be used for costs of entertainment, including amusement, diversion and social activities, and any associated costs.
<input type="checkbox"/>	<b>EQUIPMENT, INCLUDING GENERAL PURPOSE EQUIPMENT AND OTHER CAPITAL EXPENDITURES:</b> Defined as tangible, non-expendable, personal property having a useful life of more than one year and an acquisition cost of \$5,000 per unit. An item with an acquisition cost of less than \$5,000 per unit is considered <b>non-capitalized equipment</b> , also having a useful life of more than one year. *Equipment purchased with federal funds, including Perkins V funds must have: <ul style="list-style-type: none"> <li>• property records, including acquisition date, cost, source, percent of federal funds used to purchase the item, location, use and condition of the equipment and ultimate disposition.</li> <li>• adequate safeguards to prevent loss, damage, or theft.</li> <li>• adequate maintenance procedures.</li> </ul>	<input checked="" type="checkbox"/> May be used for exemplary instruction <input checked="" type="checkbox"/> May be used for required equipment for start-up of a program.  <input checked="" type="checkbox"/> May not be used for non-commercial/household grade equipment.  <input checked="" type="checkbox"/> May not be used for capital expenditures for general purpose equipment, buildings, and land.  <input checked="" type="checkbox"/> May not be used capital expenditures for improvements to land, buildings, or equipment that materially increase their value or useful life.
<input type="checkbox"/>	<b>FEES</b>	<input checked="" type="checkbox"/> May be used for instructional CTE Memberships.  <input checked="" type="checkbox"/> May not be used for an individual student such as dues, registration fees, or license/certification fees. This includes but is not limited to career/vocational technical education student organization dues, transportation, lodging, registration, and uniforms for the individual student.  <input type="checkbox"/> Some of the above examples may be used on a case-by-case basis if explicitly serving students from special populations.

<input type="checkbox"/>	<p><b>FIELD TRIPS:</b> Defined as off-site educational opportunity offered by a LEAs to enrich the educational experience of students and meet educational goals. (<a href="#">603 CMR 27.00</a>)</p>	<p><input checked="" type="checkbox"/> May be used for costs of field trips for educational purposes that address specific CTE courses and /or program related outcomes. Field trips must be open to all students participating in the CTE course or program.</p> <p><input checked="" type="checkbox"/> May not be used for the cost of field trips during which more than 25 percent of the time is spent at the location is used for entertainment or recreation of field trip participants.</p>
<input type="checkbox"/>	<p><b>FOOD</b></p>	<p><input checked="" type="checkbox"/> Never allowable.</p>
<input type="checkbox"/>	<p><b>INSTALLATION FEES</b></p>	<p><input checked="" type="checkbox"/> Expenses for installing equipment or materials, including wiring, is not allowable.</p> <p><input checked="" type="checkbox"/> May be used for equipment requiring professional installation/set up and training if needed to ensure warranty remains valid.</p>
<input type="checkbox"/>	<p><b>MAINTENANCE AND REPAIR COSTS:</b> Defined as upkeep equipment that neither adds to the permanent value of the property nor appreciably prolongs its intended life but keeps it in an efficient operating condition. (<a href="#">2 CFR Part 200, §200.452</a>)</p>	<p><input checked="" type="checkbox"/> May be used for costs incurred for necessary maintenance, repair, or upkeep of equipment which neither add to the permanent value of the property nor appreciably prolong its intended life but keep it in an efficient operating condition. Costs related to maintenance and repairs may not be excessive.</p> <p><input checked="" type="checkbox"/> May not be used for costs incurred for improvements that add to the permanent value of the buildings and equipment or appreciably prolong their intended life. These must be treated as capital expenditures.</p>
<input type="checkbox"/>	<p><b>MARKETING/PROMOTIONAL EXPENSES</b></p>	<p><input checked="" type="checkbox"/> May be used for costs for specific purposes necessary to meet the requirements of Perkins as outlined in the Local application. Example: awareness campaign for student career exploration event.</p> <p><input checked="" type="checkbox"/> Promotional materials are not allowable. Examples include cups/glasses, banners, folders, bags, key chains, gifts, notepads, pens, t-shirts. Costs for advertising designed solely to promote the LEA or its programs are not allowable.</p>
<input type="checkbox"/>	<p><b>MATERIALS AND NON-CAPITALIZED EQUIPMENT</b></p>	<p><input checked="" type="checkbox"/> May be used for costs for materials, non-consumable supplies, and fabricated parts necessary to carry out the grant. Materials and supplies purchased must represent the most current and relevant technology. Must have a useful life of more than one year.</p> <p><input checked="" type="checkbox"/> May not be used for costs of consumable, routine and general office and program supplies such as pens, paper, workbooks, laptops, tablets, sandpaper, nails, and other items that are consumed or worn out. Exceptions for consumable supplies would be those supplies used specifically for career and technical education exploration events (i.e. metal for a Women in Welding event that attracts potential gender non-traditional students to explore a career option).</p>

<input type="checkbox"/>	<b>MEMBERSHIP, SUBSCRIPTIONS AND PROFESSIONAL ACTIVITY COSTS</b>	<input checked="" type="checkbox"/> May be used for CTE-related memberships in business, technical and professional organizations. CTE-related organization subscriptions to business, professional and technical periodicals. Memberships for an LEA to participate in a professional organization may be allowable, given that supplanting is not occurring. <input checked="" type="checkbox"/> May not be used for individual memberships. <input checked="" type="checkbox"/> May not be used for memberships in country club or social or dining clubs. <input checked="" type="checkbox"/> May not be used for costs in organizations whose primary purpose is lobbying. <input checked="" type="checkbox"/> May not be used for memberships in civic or community organizations.
<input type="checkbox"/>	<b>PROFESSIONAL DEVELOPMENT TRAINING OR COURSES:</b> Professional development course descriptions may be requested as part of the determination as to whether the proposed expenditure is allowable. The final determination as to whether the proposed cost is allowable is at the discretion of OCHE.	<input checked="" type="checkbox"/> May be used for improving the initial preparation and professional development of career and technical education teachers, faculty, administrators, and counselors: for example, a course or Professional Development training in which deliverables and follow up outcome activities benefit (a) CTE students and (b) CTE programs would be allowable even though it might incidentally provide the educator with credits towards certification or licensing. <input checked="" type="checkbox"/> May not be used for costs of a course or training in which outcomes only benefit the individual teacher.  Example of an unallowable cost: A plumbing teacher, which has no plans or has purchased no equipment to upgrade its plumbing program with new technologies, would not be funded to receive course or PD training in new plumbing technologies, as that would only benefit the individual teacher and not the program.
<input checked="" type="checkbox"/>	<b>PROFESSIONAL SERVICES COSTS</b>	May be used for costs of educational professional and consultant services by persons who are members of a particular profession or possess a special skill and who are not employees of the school.
<input checked="" type="checkbox"/>	<b>PROFESSIONAL STAFF</b>	<input checked="" type="checkbox"/> May be used for costs of: <ul style="list-style-type: none"> <li>• CTE instructor positions</li> <li>• Technical instructional aide positions</li> <li>• Career counselor positions</li> <li>• Other instructional or professional staff providing services in a Perkins program</li> </ul> <input checked="" type="checkbox"/> May be used for staff funded partially with grant funds or from multiple grants when the employee divides his/her time between more than one federally supported grant program, provided that records of the time distribution between grant projects are kept current.

<input type="checkbox"/>	<b>PUBLICATIONS AND PRINTING</b>	<input checked="" type="checkbox"/> May be used only for publication costs for electronic and print media that are necessary to carry out the grant, including distribution and general handling. Media cannot be used for recruiting to an individual college.  <input checked="" type="checkbox"/> May not be used for costs not specifically identified with the grant.
<input type="checkbox"/>	<b>STIPENDS</b>	<input checked="" type="checkbox"/> Stipends for any staff employed by the recipient LEA to perform tasks outside their work hours and normal duties that support a Perkins program.  <input type="checkbox"/> Stipends for staff to attend meetings and/or professional development events are not allowable unless there are follow-up activities and/or deliverables.  <input type="checkbox"/> Stipends may be allowable for students to perform work directly related to career and technical education program improvement in the school district/public two-year college, like any other qualified person to the extent allowable by state and federal employment laws and provided there are no supplanting issues. An example of supplanting would be a student replacing a staff person in the placement office who was paid with local funds to analyze graduate follow-up data is not allowable. <ul style="list-style-type: none"> <li>• Example of an allowable cost: For a student redesigning the school's career and technical education program website during the summer under the supervision of appropriate staff, in order to improve accessibility for students who may be sight impaired, may be allowable.</li> <li>• Example of an allowable cost: For a college student to peer tutor other students in career and technical education programs, under the supervision of appropriate staff, that would result in career and technical education program improvement, via the tutor identifying common student needs that may be translated into program improvement, resulting in improved core indicator of performance by the public two-year college may be allowable.</li> </ul> <p>The selection of students for work must comply with applicable school district/public two-year college policies and include provisions for equal opportunity.</p> <input checked="" type="checkbox"/> May not be used for students if the sole purpose is paying students to learn, such as would be the case if one were to provide a stipend to a student to perform a hospital internship or provide a stipend to a student to work for a company on cooperative education.

<input type="checkbox"/>	<b>TRAINING AND EDUCATION COSTS:</b> Defined as professional development programs to secondary and postsecondary teachers, faculty, administrators, and career guidance and academic counselors involved in integrated CTE programs.	<input checked="" type="checkbox"/> May be used for training and education provided for employee development.  <input checked="" type="checkbox"/> May not be used for certification or examination fees of individual secondary and postsecondary teachers, faculty, administrators, and career guidance and academic counselors.
<input type="checkbox"/>	<b>TRANSPORTATION OF STUDENTS</b>	<input checked="" type="checkbox"/> May be used to transport students enrolled in career/vocational technical education programs on field trips including college/registered apprenticeship program visits.  <input checked="" type="checkbox"/> May not be used to directly pay an individual student enrolled in a career/vocational technical education program to take a bus, plane, etc. to a cooperative education site, internship site, college, and career/vocational technical education student organization event, etc.  <input checked="" type="checkbox"/> May not be used to transport students for career/vocational technical education student organization events.
<input type="checkbox"/>	<b>TRAVEL COSTS</b>	<input checked="" type="checkbox"/> May be used for local travel for conferences, professional development, and field trips.  <input type="checkbox"/> Out-of-state travel. Prepare to respond to the following questions: <ul style="list-style-type: none"> <li>• What are the total costs of the conference and travel?</li> <li>• Are there similar trainings or Professional Development available in Montana and therefore at less cost?</li> <li>• How are these additional costs justified?</li> </ul> <input checked="" type="checkbox"/> International travel is not allowable.
<input checked="" type="checkbox"/>	<b>TUITION COSTS FOR STUDENTS</b>	<input checked="" type="checkbox"/> Not allowable.
<input type="checkbox"/>	<b>VEHICLE LEASE/PURCHASE AND LEASE TO PURCHASE:</b>	<input checked="" type="checkbox"/> May be used to purchase a vehicle if the cost is reasonable and necessary and will only be used for Perkins-related activities.  <input checked="" type="checkbox"/> May not be purchased with grant funds for the primary purpose of transporting students/staff to cooperative education* sites.  <input checked="" type="checkbox"/> May not be used for the primary purpose of transporting students/staff to career/vocational technical education student organization events.  <input checked="" type="checkbox"/> May not be used for non-career/vocational technical education activities such as transportation of sport teams.