Perkins V

Comprehensive Local Needs Assessment

Toolkit

*Version 2.1*

*Last updated: 11/8/19*

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## ***Background***

**Important Note – Guidance vs. Requirements/“Toolkit” vs. “Template”**

The intention of this document is to provide guidance to the Perkins Comprehensive Local Needs Assessment (CLNA) process and to serve as a “Toolkit” reference to share ideas on data, stakeholder engagement, resources, project management assistance, process and results documentation, and analysis techniques. The forms contained herein are voluntary and are not for submission to the Florida Department of Education (FDOE). For all CLNA documentation required to be turned in during the Perkins Request for Application (RFA) process, please visit the FDOE’s [Comprehensive Local Needs Assessment page](http://www.fldoe.org/academics/career-adult-edu/Perkins/clna.stml). This page contains the required CLNA Templates – both data tables and narrative prompts.

**Purpose**

The purpose of this document is to:

1. Help Perkins eligible recipients find the gap between the way things are and the way things should be
2. Analyze data
3. Consult with CTE stakeholders
4. Improve local CTE decision making and planning
5. Identify budgetary needs for the next 2 years, with the option of updating yearly as needed

This document does not include prompts for planning or budgeting. The focus is on identifying challenges (“needs”). Your Perkins Request for Application (RFA) will have prompts to aid planning and budgeting. You are encouraged to integrate these two processes (needs assessment and planning) as there will clearly be benefits to doing so and the stakeholders contacted through the needs assessment process can greatly contribute to your local planning.

**Document Subsections**  
Each needs assessment section within this document contains the following subsections:

|  |  |
| --- | --- |
| **Voluntary Guidance** | * **Law text and explanation** * **Data analysis**: These sections contain data source and analysis recommendations. What data sources are used and how they are analyzed is up to the discretion of the eligible recipient, unless otherwise noted. * **Stakeholder engagement**: These sections contain suggested stakeholders that may have important feedback on the section’s topic, engagement strategies, and questions to ask. How and with whom you engage on a given topic is at your discretion, provided all of the required stakeholders are consulted at some point in the needs assessment process (see pg. 8 or Sec. 134(d) and (e) for a complete list of stakeholders). |
| **Process Tools** | * **Process reporting tables** capture essential information about data analyses and stakeholder consultation that could have value for recording how you collected this information so that you can replicate the processes during future needs assessments. It can also serve to document your efforts for monitoring and auditing purposes. * **Results reporting tables** capture the needs identified and facilitate prioritization. |

**Maintenance of Documentation**

Supporting documentation for each need is to be maintained locally for reference during future needs assessments, planning, budgeting, monitoring, and audits.

**Eligible Recipient Collaboration**

Recipients of Perkins funds are strongly encouraged to share and/or collaborate with other agencies on needs assessment procedures, results, and even individual stakeholders, as appropriate and relevant. This type of collaboration may yield many benefits and strategy should be given to how to achieve this with the greatest degree of success. Collaboration could take place online (email, forums, webinars), by phone, survey or in person (one-on-one or in large group settings or focus groups).

**Interim Year Updates**

The Perkins Comprehensive Local Needs Assessment is only required to be completed every two years. During the interim year updates may be necessary and documentation of this process should be maintained locally.

## ***Process Overview***

Below is a suggested stepwise process for successfully completing the Perkins CLNA. The CLNA process merits a great deal of intentional thought and planning to coordinate the various sections, leadership members, and stakeholders in a way that brings about accurate, actionable, and strategic results leading to high-quality student employment outcomes. Consider the CLNA process as a major project that will require decisive leadership and detail-oriented project management.

**Overview of the Needs Assessment Process:**

1. **Pre-Plan**

Read through the entirety of this Comprehensive Local Needs Assessment (CLNA) Toolkit and determine requirements. Then, identify:

1. **Assignments for needs assessment management members and other support roles**.
2. **Local, personalized priorities and purposes for the CLNA:** A great deal of latitude and choice is built into Florida’s CLNA. Make the most of this by determining as a leadership group what you would like to get out of the CLNA. Revisiting and refining your mission statement or other set of operating principles prior to completing the CLNA can be highly valuable and directive.
3. **Data sources**: Add to and select from the listed data sets within each of the CLNA sections. Some of the data sources will take some time to gather and process. Give lead time to have plenty of time to interpret the data. What data sources you select should reflect your leadership team’s priorities, values, and be geared towards truly investigating the most important needs at your institution.
4. **Stakeholder engagement plan**: Stakeholder engagement is very likely to be the most time intensive part of the CLNA process. Begin the process of identifying stakeholders, contacting them, engaging, and interpreting their input very early in the CLNA process.
5. **Timeline/calendar of major CLNA events:** Once you have determined your leadership’s major priorities, how you will engage the various required stakeholders, what data sources you will investigate, and staff assignments, put the most significant milestones on a calendar to ensure that intermediate steps are met on the path towards completion of the full CLNA. Remember that the results of the CLNA will be reported in your next Perkins RFA.
6. **Gather**

Gather data and record stakeholder input. Develop a local strategy for storing these files in a centralized location and naming the files in a way to promote ease of access for multiple individuals. There can be great value in sharing this data and input with stakeholders to get their input on interpretation. In many instances, this will result in a need to gather more data based on stakeholder input.

1. **Analyze**

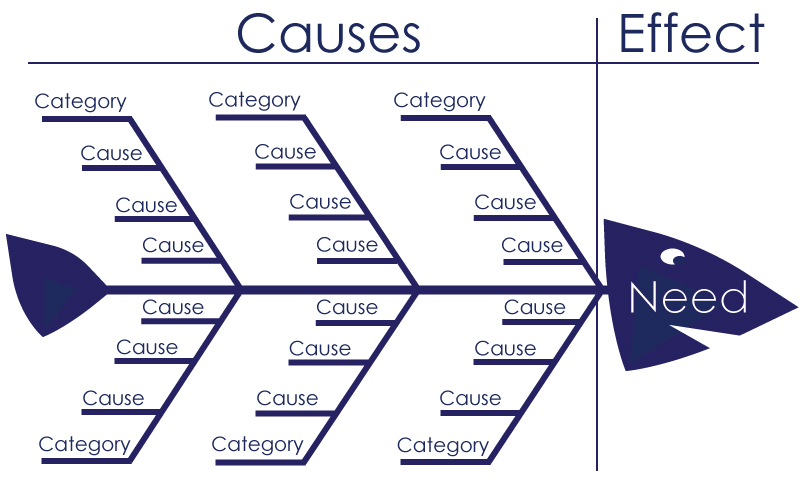
Figure 1 - A common cycle of discovery using stakeholders to interpret data, gathering more data based on their input, and returning to the stakeholders for further interpretation.

This is one of the most difficult and easily neglected steps within a needs assessment process. At its most basic level, it is determining cause and effect. The data and input you will be gathering will be the effects of some underlying cause(s) and it is your task to determine what these causes are. To use an analogy from health sciences, you will be like a doctor looking at symptoms and searching for a diagnosis. To get to an accurate diagnosis:

* **Process the data transparently** to allow for others to double check and verify your results.
* **Display the data to facilitate interpretation**. Tables, graphs, charts, word clouds, and any other means you can think of to see patterns within the data will be highly beneficial.
* **Verify findings through corroboration/triangulation.** Be skeptical. Particularly for small data sets, surprising results, or other unexpected outcomes, make sure to use multiple means of verifying patterns, such as additional data sources, stakeholder input, and evidence-based research.
* **Perform root cause analysis.** There are a number of techniques that can be used to go from the needs identified to discover root causes. One technique is to ask and answer ‘why’ five times (example below). Focused interviews, consulting experts, fish bone analysis, and reviewing evidence-based literature on the topic are additional and essential means of discovering root causes. The Colorado Department of Education has helpful guidance and examples relevant to this topic: [Root Causes Analysis Toolkit](https://www.cde.state.co.us/sites/default/files/documents/uip/downloads/rootcauseanalysis_trainingmaterials/rca2.0combinedpacket.pdf).

Figure 2 - Example of triangulation of results to improve the accuracy of a conclusion by verifying through multiple evidence sources.

**Asking ‘Why?’ Five Times to Determine a Root Cause:**

For instance, if you discover a gap in performance between two population groups asking why five times may reveal underlying factors having to do with curriculum, supports, student background, teacher training, instructional practices, materials, barriers, and any number of other contributing factors. Focus on identifying the factors most within your ability to influence.

**Fishbone/Cause-and-Effect/Ishikawa Analysis to Determine Root Cause**

The diagram to the right illustrates one method for brainstorming causal factors that contribute to an identified need (such as a performance gap). This method contrasts with the “Five Why” method listed above in that it recognizes that in many contexts it is best to look at the multiplicity of contributing factors rather than narrowing the focus to a single, primary root cause. The categories in which to brainstorm causes will vary by need context. Examples of causes for one area, non-traditional career preparation, can be viewed at [napequity.org/root](https://www.napequity.org/root/).

Figure 3 - fishbone diagram for brainstorming the causes of identified needs.

1. **Prioritize**

Within each section of this CLNA you will be asked to prioritize your results. Not all needs will be able to be addressed immediately. You are encouraged to list all major needs, though, even if you cannot address them in your upcoming Perkins Request for Application (RFA) plans. These needs can be recorded and addressed at a later date, as you are able. For each need, determine:

* **The consequences of not addressing the need** (determine importance)
* **The difficulty of addressing the need** (determine feasibility)
* **The ranking of the needs** using a 1-5 scale (5 being the most important). These priorities should drive your planning and budgeting.

1. **Plan**

While completion of the Perkins RFA is outside of the CLNA process, these two processes are integrally related and it is encouraged that you find ways of overlapping these processes as much as possible. This can be a helpful means of recording the results from the CLNA as well as allow you to consult stakeholders on what you are considering as options for addressing some of the identified needs. Additional steps to support turning needs into student-focused plans:

* **Research relevant evidence-based practices and the promising practices of other agencies** similar to you to create a list of options that could help meet the identified need. Trusted sources of CTE research and best practices: [Advance CTE](https://careertech.org/), [Association for Career & Technical Education (ACTE)](https://www.acteonline.org/), [National Alliance for Partnerships in Equity (NAPE)](https://www.napequity.org/), [Perkins Collaborative Resource Network (PCRN)](https://cte.ed.gov/legislation/perkins-v), [Council of Chief State School Officers (CCSSO)](https://ccsso.org/topics/career-readiness), [National Research Center for Career and Technical Education (NRCCTE)](http://www.nrccte.org/).
* **Establish both long-term and short-term intervention plans** (both for your 1-year planning included in the Perkins application and for your 4-year plan)
* **Establish an evaluation strategy, lead person, deadline, and high-level process description for each intervention.**
* **Determine budgetary expenses based on CLNA findings.**

***Process Planning***

This CLNA process is a significant undertaking and should be managed with a large degree of structure to ensure the highest quality outcome. To the greatest extent possible, divide the tasks up amongst a leadership team. You can use the below table to brainstorm, invite, and assign major task leadership.

|  |  |
| --- | --- |
| **Local Perkins Needs Assessment Leadership Team** | |
| **Local Oversight** |  |
| **Overall**  **Process Manager(s)** |  |
| **Data Expert(s)** |  |
| **Stakeholder Engagement Manager(s)** |  |
| **Regional Partners** |  |

**Stakeholder Consultation**

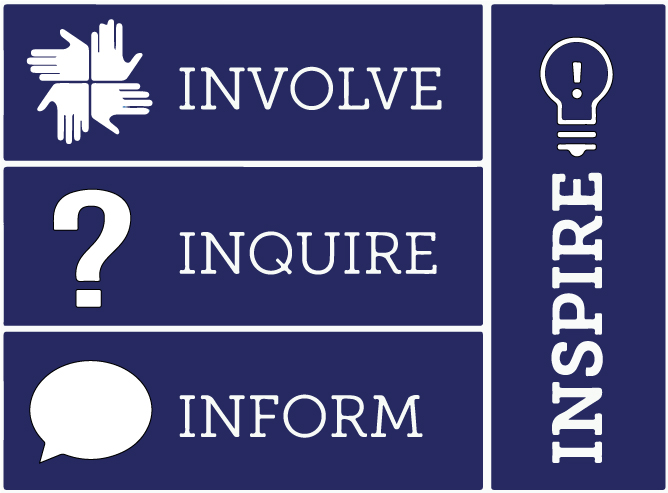
Perkins V mandates that eligible recipients consult with local stakeholders during the needs assessment process. Below is the list of required stakeholders as appears in the Law.

|  |
| --- |
| **Perkins Law - Sec. 134(d) – Required CLNA Stakeholder Consultation** |
| (d) CONSULTATION.—In conducting the comprehensive needs assessment under subsection (c), and developing the local application described in subsection(b), an eligible recipient shall involve a diverse body of stakeholders, including, at a minimum—  (1) 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;  (2) representatives of career and technical education programs at postsecondary educational institutions, including faculty and administrators;  (3) representatives of the State board or local workforce development boards and a range of local or regional businesses or industries;  (4) parents and students;  (5) representatives of special populations;  (6) 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);\*  (7) representatives of Indian Tribes and Tribal organizations in the State, where applicable; and  (8) any other stakeholders that the eligible agency may require the eligible recipient to consult. |

\*[Section 1432 of the Elementary and Secondary Education Act of 1965](https://www2.ed.gov/policy/elsec/leg/esea02/pg11.html#sec1432): “(2) AT-RISK- The term at-risk', when used with respect to a child, youth, or student, means a school aged individual who is at-risk of academic failure, has a drug or alcohol problem, is pregnant or is a parent, has come into contact with the juvenile justice system in the past, is at least 1 year behind the expected grade level for the age of the individual, has limited English proficiency, is a gang member, has dropped out of school in the past, or has a high absenteeism rate at school.”

**The Use of the Plural in the Stakeholder Section of the Law**

Each stakeholder listed in the Law is written in the plural, which means multiple representatives are required.

**What Does It Mean to Consult? Involve, Inquire, Inform, Inspire**

Full-fledged consultation is both a process and a disposition. Humility, openness to change and constructive criticism, transparency, respect, and a deep commitment to the best interest of students are fundamental dispositions of effective consultation. Without these dispositions, the entire consultation process will be ineffectual. Instead, aim at listening, learning, and finding better ways to help students find career success. An overview of the process is illustrated in Figure 4 and below.

* **Involve** stakeholders as active co-creators of policies and programs.
* **Inquire** for input on CTE weaknesses, strengths, opportunities, and barriers.
* **Inform** stakeholders on a host of topics throughout the consultation process – the CLNA process, what CTE is, how they can get involved, etc.
* **Inspire** stakeholders on why CTE is important and serves as a critical means of shaping student’s career trajectories and the labor market.

Figure 4 - Model for full-fledged consultation. Read more: https://www2.ed.gov/about/inits/ed/implementation-support-unit/tech-assist/framework-communications-engagement.pdf

**Educating While Consulting**

In the stakeholder engagement process, there is a high degree of likelihood that you will need to educate some stakeholders on what CTE is, what CTE programs are offered locally, local/regional/state labor market demand, aggregated student performance information, and a long list of other potential topics. These topics will vary by stakeholder group, but it is recommended that you prepare appropriate information ahead of time in anticipation of common misconceptions, knowledge gaps, and information that could spur or support relevant conversation. [ACTE has a list of basic CTE fact sheets that can be used or modeled off of](https://www.acteonline.org/why-cte/what-is-cte/basic-facts/).

“Everyone you will ever meet knows something you don’t.”

--Bill Nye, science educator

**Strategies for Engagement**

Many eligible recipients will be able to integrate much of the required stakeholder engagement into their existing processes, such as through their local advisory boards. Leveraging existing consultation practices is strongly encouraged. There will likely be the need for additional engagement opportunities and a large variety of engagement means are available. [AdvanceCTE has compiled a list of stakeholder engagement and communication resources](https://careertech.org/Perkins-Virtual-Resource-Table) (see ‘Stakeholder Engagement and Communication’ section). Additionally, the [EPA has a helpful list of in-person engagement tools](https://www.epa.gov/international-cooperation/public-participation-guide-tools-generate-and-obtain-public-input).

|  |
| --- |
| **Example Stakeholder Engagement Strategies and Opportunities** |
| * Events - professional development, advisory meetings, CTE showcases, PTO meetings, CTSO events, etc. * Meetings – roundtable, focus group, work group, listening session, etc. * Classrooms – surveys, discussions, etc. * Digital surveys – social media/blog, website, newsletter/listserv, e-blast, etc. * Earned media (i.e., press coverage) * Webinars * Direct mail of paper surveys * Personalized emails * Phone calls |

**Example Broad Engagement Style – Strengths, Weaknesses, Opportunities, Barriers**

The style of engagement you choose will depend on the means, topic, and stakeholder category you are engaging. Pointed, narrowly-focused prompts are very appropriate for a number of situations. However, broad strategies should be used in contexts to elicit input on topics that could not be anticipated beforehand. An example of open-ended, comprehensive engagement is “SWOT” analysis, a technique commonly used in business strategic planning. Within CTE, this technique could be used with stakeholders to brainstorm the ‘strengths,’ ‘weaknesses,’ ‘opportunities,’ and ‘barriers’ (substituted for ‘threats’) of locally offered CTE or a particular aspect of local CTE, such as dual enrollment or career counseling. As these prompts are discussed, ideas could be captured for later analysis on a whiteboard or easel board. An example of questions supporting these topics is below.

|  |  |
| --- | --- |
| ***Strengths*:** What are our CTE strengths? | ***Weaknesses*:** What are our CTE weaknesses? |
|  |  |
| ***Opportunities*:** How can we innovate and grow? | ***Barriers*:** What could keep us from our goals? |
|  |  |

**Strategizing for Regional Stakeholder Engagement**

After reviewing the required list of stakeholders, consider which of these individuals/groups could be appropriately shared with and consulted simultaneously with other eligible recipients in your region (see suggestions in table below). Some categories can have a mixed approach – they can both be consulted locally and be a part of larger regional discussions. An example of this is CTE students. You will have to consult with them locally, but if you choose to have a region-wide, collaborative meeting, they could be valuable voices to have represented at that meeting. Consult with your regional eligible recipients to consolidate contact in order to avoid fatiguing some of your required stakeholders.

|  |  |
| --- | --- |
| **Regional Sharing Strategy for Required Stakeholders** | |
| **Can Be Regionally Shared** | **Local Engagement with the Option of Regional Engagement** |
| * Representatives of the State board or local workforce development boards and a range of local or regional businesses or industries * 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 * Any other stakeholders that the eligible agency may require the eligible recipient to consult | * 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 * Parents and students * Representatives of special populations |

**Continued Consultation**

Sec. 134(e) mandates that Perkins eligible recipients are to consult with stakeholders in an “ongoing basis” to inform decisions, plans, and budgeting. You are strongly encouraged to integrate into your normal operating procedures the stakeholder consultation and data analysis requirements of this needs assessment. Find as many ways as you can to distribute the load of this needs assessment across personnel and your school year.

|  |
| --- |
| **Perkins Law - Sec. 134(e) – Required Ongoing Consultation** |
| (e) CONTINUED CONSULTATION.--An eligible recipient receiving financial assistance under this part shall consult with stakeholders described in subsection(d) on an ongoing basis, as determined by the eligible agency. This may include consultation in order to—  (1) provide input on annual updates to the comprehensive needs assessment required under subsection (c)(1)(B);  (2) ensure programs of study are—  (A) responsive to community employment needs;  (B) aligned with employment priorities in the State, regional, tribal, or local economy identified by employers and the entities described in subsection(d), which may include in-demand industry sectors or occupations identified by the local workforce development board;  (C) informed by labor market information, including information provided under section 15(e)(2)(C) of the Wagner-Peyser Act (29 U.S.C. 491-2(e)(2)(C));  (D) designed to meet current, intermediate, or long-term labor market projections; and  (E) allow employer input, including input from industry or sector partnerships in the local area, where applicable, into the development and implementation of programs of study to ensure such programs of study align with skills required by local employment opportunities, including activities such as the identification of relevant standards, curriculum, industry-recognized credentials, and current technology and equipment;  (3) identify and encourage opportunities for work-based learning; and  (4) ensure funding under this part is used in a coordinated manner with other local resources. |

Below is an example stakeholder engagement scenario that incorporates all the required CLNA components and all required stakeholders. This example is only given as an illustration. Customize your own approach as a leadership team.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Example Stakeholder Engagement Scenario** | | | | |
| **Phase** | **When** | **Topics** | **Stakeholders** | **Engagement Means** |
| **Local Program Assessment** | Late Summer/  Early Fall | * Student Performance * Size, Scope, and Quality * Labor Market Alignment | * CTE faculty and staff * Parents and students * Special populations * Out-of-school, homeless, at-risk * Business/industry * Indian Tribes/Tribal orgs | * Leadership work groups * Focus groups |
| **Regional Summit** | Mid Fall | * Labor Market Alignment * Programs of Study | * Secondary * Postsecondary * CareerSource, WDBs * Business/industry * Out-of-school, homeless, at-risk * Indian Tribes/Tribal orgs | * Guided roundtable discussion |
| **Local Implementation**  **Assessment** | Late Fall | * Implementation Progress * Faculty & Staff * Equity & Access | * CTE faculty and staff * Parents and students * Special populations * Out-of-school, homeless, at-risk | * Leadership work groups * Focus groups * Survey students * Classroom discussions |

**Aligning CLNA Topics with Stakeholder Categories**

After reviewing each CLNA section, use the below table to determine alignment between required stakeholder categories identified in Section 134(d) of Perkins V and CLNA topics. Put a checkmark in blank cells to represent that the row’s stakeholder category should be consulted on the column’s CLNA topic. Consider which stakeholder categories will have expertise or could contribute vital input on the various CLNA topics.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Topic and Stakeholder Category Planning** | | | | | | | |
| **Directions:** *Put a checkmark in blank cells to represent that row’s stakeholder category should be consulted on the column’s CLNA required components.* | | **Student Performance** | **Size, Scope, and Quality** | **Labor Market Alignment** | **Implementation Progress** | **Faculty**  **and Staff** | **Equity and Access** |
| **CTE** | Secondary CTE Faculty & Staff |  |  |  |  |  |  |
| Postsecondary CTE Faculty & Staff |  |  |  |  |  |  |
| Parents and Students |  |  |  |  |  |  |
| **Business** | Workforce Development Boards |  |  |  |  |  |  |
| Business and Industry |  |  |  |  |  |  |
| **Special Populations** | Representatives of Special Populations |  |  |  |  |  |  |
| Out-of-School, Homeless, & At-Risk Youth |  |  |  |  |  |  |
| Indian Tribes and Tribal Organizations (if applicable) |  |  |  |  |  |  |
|  | Other |  |  |  |  |  |  |

Use the below table to plan stakeholder engagement opportunities, contacts, and strategies.

|  |  |  |
| --- | --- | --- |
| **Strategizing Engagement by Stakeholder Category** | | |
| **Stakeholder Category** | **Organizations, Contacts, Opportunities** | **Engagement Strategies** |
| (1) 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; |  |  |
| (2) representatives of career and technical education programs at postsecondary educational institutions, including faculty and administrators; |  |  |
| (3) representatives of the State board or local workforce development boards and a range of local or regional businesses or industries; |  |  |
| (4) parents and students; |  |  |
| (5) representatives of special populations; |  |  |
| (6) 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) |  |  |
| (7) representatives of Indian Tribes and Tribal organizations in the State, where applicable; and |  |  |
| (8) any other stakeholders that the eligible agency may require the eligible recipient to consult. |  |  |

Use the below table to plan out major CLNA events within your school year.

|  |  |  |  |
| --- | --- | --- | --- |
| **Major Events Planning for Perkins Needs Assessment** | | | |
| **Needs Assessment Section** | **Stakeholders to Engage** | **Data Needed** | **Timeframe** |
| Student Performance |  |  |  |
| Size, Scope, and Quality |  |  |  |
| Labor Market Alignment |  |  |  |
| Implementation Progress |  |  |  |
| Faculty and Staff |  |  |  |
| Equity and Access |  |  |  |

|  |
| --- |
| ***CLNA Required Component Sections: Student Performance; Size, Scope, and Quality; Labor Market Alignment; Implementation Progress; Faculty and Staff; Equity and Access*** |

***Student Performance***

|  |  |
| --- | --- |
| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | **What the Law Means** |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following:  (A) An evaluation of the performance of the students served by the eligible recipient with respect to State determined and local levels of performance established pursuant to section 113, including an evaluation of performance for special populations and each subgroup described in section 1111(h)(1)(C)(ii) of the Elementary and Secondary Education Act of 1965.” | Eligible recipients must identify deficiencies, gaps, and trends in performance and work towards continuous improvement for all levels and populations. |

|  |  |
| --- | --- |
| Data Analysis (VOLUNTARY GUIDANCE) | |
| Data Sources and Analyses | **What to Look for in the Data** |
| Select from the following options or add your own.   * Perkins performance data for multiple years (if available) disaggregated by CTE program, school (if applicable), and population groups including:   + Gender   + Race and ethnicity   + Migrant status   + Individuals with disabilities   + Individuals from economically disadvantaged families, including low-income youth and adults   + Individuals preparing for nontraditional fields   + Single parents, including single pregnant women   + Out-of-work individuals   + English learners   + Homeless individuals   + Youth who are in, or who have aged out, of the foster care system   + Youth with a parent who is on active duty military * Comparison data for ‘all’ students – Secondary comparisons for graduation rates, academic performance and placement – Postsecondary comparisons for credential attainment and placement. * Strategies utilized to address performance gaps for specific subgroups along with outcomes for the strategies attempted | **Data Analysis Guidance**   * Use the most recent, valid, and reliable data available * Calculate performance by dividing the indicator numerator by the denominator * Calculate ‘% of target met’ by dividing ‘local performance’ by ‘local target’ * Determine highest and lowest by sorting the data * Determine significant changes and trends through graphing or preferred statistical means * When sample sizes are small, performance variations may not be indicative of noteworthy performance gaps or trends. For instance, if the performance indicator’s numerator is 2 and the denominator is 3 the performance is 66.7%. If the numerator drops by one, the performance changes to 33.3%. While it appears that the performance has dropped dramatically, this is due to the change of only one individual and should be interpreted as such. In such cases, corroborate/triangulate performance by comparing similar data sets across years, samples, indicators, schools, programs, etc. * For Excel users needing directions on performing calculations, sorts, graphs, and other functions, internet keyword searches will yield a wide variety of tutorials, including at <https://support.office.com/en-us/excel>.   **Eligible Recipient Analysis**   * Sort ‘% of target met’ to determine the highest and lowest performing indicators * Identify significant changes in performance between years * Identify trends in performance that span multiple years   **School Analysis** (If Applicable)   * Determine highest and lowest performances * Identify significant changes in performance between years * Identify trends in performance that span multiple years   **Population Analysis**   * Determine highest and lowest performances * Identify any disparities and gaps in performance on the local determined levels of performance between the special populations or subpopulations and the performance of all CTE concentrators. Focus should be given to all gaps with the greatest focus being placed on the largest gaps. * Identify significant changes in performance between years * Identify trends in performance that span multiple years   **Program Analysis**   * Determine highest and lowest performances * Identify significant changes in performance between years * Identify trends in performance that span multiple years |

|  |  |
| --- | --- |
| Stakeholder Engagement (VOLUNTARY GUIDANCE) | |
| Stakeholders | **Engagement Strategies** |
| All stakeholders required by law, particularly:   * Secondary teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals * Postsecondary faculty and administrators * Tribal organizations and representatives * Corrections education staff * Representatives of special populations * Representatives of regional or local agencies serving out-of-school youth, homeless children and youth, and at-risk youth * Data staff | * Work group to examine data including educators, career guidance professionals, and representatives of special populations * Assemble educator groups by CTE career area to examine data |
| Questions to Ask | |
| Top-Line Questions   * Which performance accountability indicator targets are you meeting and not meeting at the eligible recipient level, the eligible recipient program level and the school program level? What are the root causes for meeting or not meeting these targets? * How are learners from different genders, races and ethnicities performing in your CTE programs at the eligible recipient level, the eligible recipient program level and the school program level, particularly in programs leading to high-skill, high-wage or in-demand industry sectors or occupations? * How are learners from each special population performing in your CTE programs in comparison to students without identified special needs at the eligible recipient level, the eligible recipient program level and the school program level, particularly in programs leading to high-skill, high-wage or in-demand industry sectors or occupations? * What is the variation in performance among students in different programs, and what is driving those differences in performance?   Other Deep-Dive Questions:   * How are you performing on other measures of student performance (e.g., ESSA, SACS, COE) at the eligible recipient, school and program levels? * Which groups of learners are struggling the most in CTE programs across the board? Which groups are having the most success? What are the root causes leading to these outcomes? * Where do the biggest gaps in performance exist between groups of learners for each accountability indicator? What are the root causes of these gaps? * Are there certain CTE programs in which specific special population groups are performing above average? Below average? What are the root causes of these differences? * How are learners in your CTE programs performing on accountability indicators in comparison to non­CTE learners (e.g., ESSA, SACS, COE)? What are potential explanations for these differences? | |

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| PROCESS Reporting for Data Analysis for Student Performance | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting Stakeholder Engagement Student Performance | |
| List all stakeholder categories engaged on Student Performance. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Planning and Budgeting for Student Performance | | | | | |
| Results Code  (Add rows as necessary by placing your cursor in the bottom right cell and pressing ‘Tab.’) | **Need** | **Root Cause**  (See Process Overview section for techniques.) | **Consequences of Not Addressing** | **Difficulty to Correct** (High, Medium, Low) | **Priority** (1-5) |
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***Size, Scope, and Quality***

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| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | **What the Law Means** |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following…  (B) A description of how career and technical education programs offered by the eligible recipient are—(i) sufficient in size, scope, and quality to meet the needs of all students served by the eligible recipient;” | Eligible recipients must measure their programs against the State definitions of size, scope, and quality to determine if they are able to use funds on them. Perkins V excludes the use of funds to “develop, coordinate, implement, or improve” (Sec. 135(a)) CTE that is not of “sufficient size, scope, and quality to be effective.” (Sec. 135(b)) The use of “develop” and “implement” in Sec. 135(a) indicates that funds may be used on programs that in the coming year will be of sufficient Size, Scope, and Quality but may not be at the time of completing the Comprehensive Local Needs Assessment. This interpretation avoids supplanting violations excluded in Sec. 211(a). |

**NOTE:** The following guidance on Size, Scope, and Quality is split into two sections – the first focuses on determining needs and the second focuses on documenting those needs. Read both sections before beginning your analysis. Visit <http://www.fldoe.org/academics/career-adult-edu/Perkins/clna.stml> for Size, Scope, and Quality documentation requirements. Both narrative descriptions and completion of a detailed documentation inventory of programs is required.

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| Part 1: Determine Size, Scope, and Quality | | |
| Data Analysis (VOLUNTARY GUIDANCE) | | |
| SIZE | | |
| Each program utilizing Perkins V funds must: | **Data Sources for Size** | **What to Look for in the Data for Size** |
| Middle School   * Provide an opportunity for middle school students who earn CTE high school credit to take at least two additional CTE courses in high school in the CTE program started in middle school (or one additional course in programs with only two courses). * Provide middle grades exploratory CTE courses (as identified by the Department) that introduce students to CTE programs available at the high school level (grades 9-12) in the school district.   High School   * Provide an opportunity for students to take three CTE courses in a single CTE program (or two courses in programs with only two courses).   Postsecondary   * Provide an opportunity for students to become CTE concentrators.[[1]](#footnote-1) | * A complete list of CTE programs offered that includes the course sequence offered at each campus/high school * CTE course enrollments for the past several years | * Enough courses offered within CTE programs that students can concentrate in and complete the program * Program/Cluster alignment between middle school CTE and high school CTE * Gaps in course enrollment within programs |
| SCOPE | | |
| Each program utilizing Perkins V funds must: | **Data Sources for Scope** | **What to Look for in the Data for Scope** |
| Secondary & Postsecondary (Identical)   * Provide students an opportunity for work-based learning, career and technical student organizations, or capstone experiences that engage students learning inside or outside the classroom. * Strategically engage business and industry to ensure CTE program offerings meet current or future workforce demand as substantiated by the eligible recipient’s most recent Comprehensive Local Needs Assessment. | * List of work-based learning opportunities offered by program and campus/high school and their outcomes * List of businesses or industry representatives serving on program advisory councils and how they are engaged | * Programs that are not currently offering work-based learning * Programs that do not have advisory business/industry representatives * Programs that have business/industry contacts but are not meeting with them regularly or meaningfully |
| QUALITY | | |
| Each program utilizing Perkins V funds must: | **Data Sources for Quality** | **What to Look for in the Data for Quality** |
| Secondary & Postsecondary (Identical)   * Provide an opportunity for students to earn a recognized postsecondary credential. * Provide instruction that integrates academic, technical, and employability knowledge and skills. * Provide instruction that incorporates relevant equipment, technology and materials to support learning. * Provide CTE instructors who are given support to: (1) maintain up to date knowledge and skills across all aspects of industry, and (2) maintain relevant evidence-based pedagogical knowledge and skills necessary to support learning. * Implement measures to eliminate barriers and create opportunities for all students to succeed in career and technical education. | * List of credentials offered within each program * Data on student attainment of credentials * Data on student academic performance * Information on academic integration in CTE – professional development supporting academic integration into CTE, known local academic/CTE collaboration, etc. * Data on teacher/employer assessments of employability skills, like through work-based learning opportunities * Information on activities that locally support employability skills development * Relevant inventories of CTE equipment, technology, and materials – current and needed   (Professional development assessments taken up under the Faculty and Staff section. Equity and access assessments taken up under the Access and Equity section.) | * Programs not offering recognized postsecondary credentials * Programs with low attainment of credentials or performance on technical skill assessments * Programs with low academic performance * Programs with low employability skill performance * Lack of supports for the acquisition of technical, academic, and employability skills * Programs that lack essential equipment, technology, or materials |

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| Stakeholder Engagement (VOLUNTARY GUIDANCE) | |
| Stakeholders | **Engagement Strategies** |
| All stakeholders required by law, particularly:   * Administrators, staff, teachers and faculty (middle school, high school, technical college, state college, as applicable) * Representatives of special populations * Corrections education staff * Tribal organizations and representative * Parents and students * Business and industry representatives * Career guidance and advisory professionals * Data staff | * Work group to examine data including educators, career guidance professionals, representatives of special populations, and employers. * Face to face group of educators to examine data * Focus group, interview or survey of:   + parents and students,   + employers,   + separate group for those representing special populations, corrections educations, and Tribal organization   + guidance staff |
| Questions to Ask | |
| Middle School Topic: Alignment with High School   * Are there any middle grades exploratory CTE courses that are not strategically aligned to a high school career preparatory or technology education program? If so, what schools are currently offering courses that do not align to a pathway? Where can enhancements be made? * To what extent does my district allow middle grades students who earn CTE high school credit the opportunity to continue their studies in the very same program in high school? Does my district have gaps? * To what degree are there opportunities for learners to explore careers or participate in CTE programs or programs of study in middle school? How does this vary across programs? Across student groups? * Should we be offering more middle school CTE programs? If so, which high school programs would most benefit from having additional preparatory middle school programs?   Size Topics: Ability to Concentrate and Complete   * Does every high school in my district offer three or more courses in a single CTE program? Are there high schools that only offer one or two courses in a program? If so, why? Are there improvements or enhancements that can be made to CTE program course sequencing? * Does my technical college or state college offer any partial CTE programs? How will this impact the ability for students to become postsecondary CTE concentrators? Where are the gaps and what improvements need to be made to close those gaps?   Scope Topics: Work-Based Learning and Business Engagement   * Which CTE programs currently offer work-based learning opportunities (either cooperatively or as a separate course in conjunction with the CTE program)? Which programs do not and why? * Which programs offer work-based learning opportunities but have low student participation in those opportunities? * Are capstone learning opportunities (either cooperatively or as a separate course in conjunction with the CTE program) available in all CTE programs? * Which programs offer work-based learning opportunities but the opportunities insufficiently support learning of technical or employability skills (either because the opportunities are too brief or because students have performed poorly on technical/employability skill assessments)? * To what degree do learners in some or all of your programs of study have opportunities to participate in career technical student organizations (CTSOs)? How integrated are CTSOs with program curriculum? How does this vary across programs? Across student groups? What are the barriers that exist to offering CTSOs? * How does my agency currently engage business and industry to ensure workforce alignment? How does my agency currently document business and industry involvement? * Are there business and industry involvement gaps and what improvements need to be made to close those gaps?   Quality Topics: Credentialing, Integration of Technical/Academic/Employability Content, Equipment/Tech/Materials  (Additional questions regarding instructor training and equity & access handled in the ‘Faculty and Staff’ and ‘Equity and Access’ sections.)   * What credentials (industry certifications, licensure, certificate, degree) are offered within each program? Are there secondary CTE programs that do not offer a recognized postsecondary credential? * Which programs offer credentials that are not in demand by employers? * Are state CTE curriculum frameworks (academic, technical and employability standards) being taught with fidelity? Does the curriculum used to deliver the standards integrate academic, technical and employability knowledge and skills? What other instructional methods/materials are used to ensure academic and technical integration? * Which programs insufficiently train students in the technical skills demanded by employers (as assessed by employers or as demonstrated through low examination performance)? * Which programs insufficiently integrate aligned academics (standards, projects, collaboration with academic teachers, etc.)? * Which programs insufficiently integrate employability skills (by omitting standards included in its Curriculum Framework, insufficiently training students, and/or by providing too few opportunities to build employability skills)? * Do CTE programs have current instructional materials, equipment and technology? Where are the gaps? * What are the different types of support and frequency of support provided to CTE teachers and faculty? Would current support strategies meet the proposed “quality” standard? If not, what enhancements need to be made in order to meet the standard? * What mechanisms are currently in place to ensure access and equity for all students in CTE? Are there model programs for replication? Are there CTE programs with perceived shortcomings or barriers? If so how can this be remediated?   Overarching Topics   * How do my programs compare to [ACTE’s Quality CTE Program of Study Self-Evaluation](https://www.acteonline.org/professional-development/high-quality-cte-tools/)? * To what degree do learners have access to job placement services? How does this vary across programs? Across student groups? * To what degree are students who want to enroll in your programs unable to do so because of capacity limitations, as determined by program wait lists, student surveys or other evidence? * What populations of students are and are not accepted into my programs? What are some of the reasons? * To what degree do programs use data for program improvement and decision making? How does the use of data vary across programs? | |

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| Part 2: Document Size, Scope, and Quality |

Visit <http://www.fldoe.org/academics/career-adult-edu/Perkins/clna.stml> for Size, Scope, and Quality documentation requirements. Both narrative descriptions and completion of a detailed documentation inventory of programs is required.

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| PROCESS Reporting for Data Analysis for Size, Scope, and Quality | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting Stakeholder Engagement Size, Scope, and Quality | |
| List all stakeholder categories engaged on Size, Scope, and Quality. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Programs Not Meeting Size, Scope, and Quality | | | |
| Results Code (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **List all programs you offer that do not meet all of the Size, Scope, and Quality criteria.** | **List the Size, Scope, and Quality criteria these programs have yet to achieve.** | **Priority** (1-5) |
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***Labor Market Alignment***

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| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | **What the Law Means** |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following—  …  (B) A description of how career and technical education programs offered by the eligible recipient are—  …  (ii)(I) aligned to State, regional, Tribal, or local in-demand industry sectors or occupations identified by the State workforce development board described in section 101 of the Workforce Innovation and Opportunity Act (29 U.S.C. 3111)(referred to in this section as the `State board') or local workforce development board, including career pathways, where appropriate; or  (II) designed to meet local education or economic needs not identified by State boards or local workforce development boards.” | Agencies must describe and provide documentation of the labor market alignment for their career and technical education programs, which shall substantiate the funds being spent “to develop, coordinate, implement, or improve” programs. |

**NOTE:** The following guidance on Labor Market Alignment is split into two sections – the first focuses on determining labor market alignment and the second focuses on documenting that labor market alignment. Read both sections before beginning your analysis. Visit <http://www.fldoe.org/academics/career-adult-edu/Perkins/clna.stml> for Labor Market documentation requirements. Both narrative descriptions and completion of a detailed documentation inventory of programs is required.

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| Part 1: Determine Labor Market Demand | | |
| Data Analysis (VOLUNTARY GUIDANCE) | | |
| Data Sources and Analyses | **What to Look for in the Data** | |
| Select from the following options or add your own.   * Complete list of programs organized by primary occupation * DEO [State and Regional Demand Occupation Lists](http://www.floridajobs.org/workforce-statistics/publications-and-reports/labor-market-information-reports/regional-demand-occupations-list) * DEO [Florida Employment Projections](http://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections) * DEO State and Regional employment [data dashboards](http://www.floridajobs.org/workforce-statistics/products-and-services/dashboards) * CareerSource [Local Workforce Development Area WIOA Plans](http://www.floridajobs.org/local-workforce-development-board-resources/programs-and-resources/local-workforce-development-area-wioa-plans) * CareerSource [Local Targeted Occupations List](http://www.floridajobs.org/office-directory/division-of-workforce-services/workforce-programs/local-targeted-occupations-list) * Results of any available gap analysis on educational outcomes and employment needs (check with local workforce board) * Input from local business and industry representatives, with reference to opportunities for special populations * Program exiter education and employment outcomes from [FETPIP](http://www.fldoe.org/accountability/fl-edu-training-placement-info-program/workforce-edu-reports.stml), or alumni follow up survey * Trend data on student enrollment by program | **Programs to Open**  Identify occupations where new program offerings may be needed in your region, particularly those that are:   * High-demand (comparatively high number of annual openings – if the occupation is included on the DEO’s State/Regional Demand Occupation List, it meets this criteria) * High-growth (comparatively high regional/State annual percent growth – if the occupation is included on the DEO’s State/Regional Demand Occupation List, it meets this criteria), or * High-wage (mean and entry wages exceeding DEO’s Region/State High-Skill/High-Wage criteria)   Filter your labor market data, such as the Region/State Demand Occupation List to show only those designated as HSHW (high-skill, high-wage) and then sort the percent growth or annual openings columns. Determine whether you currently offer training opportunities for these occupations and create a list of high-wage, high-demand, and high-growth occupations for your you need to evaluate your agency should consider offering the program in the future. Tutorials for Excel: [Filtering](https://support.office.com/en-us/article/Filter-data-in-a-range-or-table-01832226-31b5-4568-8806-38c37dcc180e), [Sorting](https://support.office.com/en-us/article/sort-data-in-a-range-or-table-62d0b95d-2a90-4610-a6ae-2e545c4a4654).  Bear in mind that labor market data sources will often underrepresent occupations not well surveyed in their information gathering process. Examples include agriculture, self-employment, and emerging occupations. Information on these occupations will need to be gathered through additional means – often through engagement with business and industry representatives.  **Programs to Close**  Identify occupations without strong labor market demand or wages for which you do currently offer a training program:   * Low wages * Low or negative annual openings * Low or negative annual percent growth, or * Low or negative multi-year growth projections   (DEO’s Demand Occupation List is only inclusive of occupations meeting at least medium-wage, openings, skill, and growth Selection Criteria.)  Review this list and consider whether this program offering should be phased out.  **Program Capacity Expansion**  For occupations that have high regional/State wages, openings, growth, or projections, consider if additional resources should be directed towards expanding capacity for programs that prepare students for these occupations. This type of analysis can also be completed at the Career Cluster or Career Cluster Pathway level using occupation and program crosswalks, such as those offered by [AdvanceCTE](https://careertech.org/crosswalks). | |
| Stakeholder Engagement (VOLUNTARY GUIDANCE) | | |
| Stakeholders | | **Engagement Strategies** |
| All stakeholders required by law, particularly:   * Secondary teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals * Postsecondary faculty and administrators * Business and community partners * Local workforce development and economic development boards * Representatives of Indian Tribes and Tribal organizations, where applicable * Former students * Data staff | | * Work group to examine data including educators, career guidance professionals, and workforce development staff. * Focus group, interviews, study circle with:   + Students and former students   + Local agencies involved in workforce initiatives   + Business, industry and community partners |
| Questions to Ask | | |
| Top-Line Questions   * What industries are projected to grow the most in Florida, your region, or local area in the short, medium and long terms? Which of these occupations meet a state-determined definition of "high skill" and/or "high wage?" * To what degree do your CTE program enrollments match projected job openings in the state, region or local area? Where are the biggest gaps, particularly in high-skill or high-wage jobs? * To what degree do your CTE program offerings expose learners to all the high-skill, high-wage and in­demand industry sectors or occupations in your region? Where are there gaps? * To what degree do your CTE program offerings expose learners to the emerging high-skill, high-wage and in-demand industry sectors or occupations in your region? Where are there gaps? * What skills that industry partners need are you incorporating into your programs? What skills are lacking in your programs?   Other Deep-Dive Questions   * Which programs are completers/concentrators finding success in the labor market? Are there programs in which placement rates are low? If so, why? * How are you validating the skills being taught in your programs with business and industry partners? * How are you preparing students for the potential workplace of the future, using new trends and innovations? * How are you being intentional about educating and providing supports for learners with disabilities, English learners, part-time students and other special populations in programs and programs of study leading to high-skill, high-wage or in-demand industry sectors or occupations? * If you are not currently providing programs to meet the needs of high-skill, high-wage or in-demand industry sectors or occupations, how are other programs and service providers in your region addressing those labor market needs? | | |

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| Part 2: Document Labor Market Alignment |

Visit <http://www.fldoe.org/academics/career-adult-edu/Perkins/clna.stml> for Labor Market Alignment documentation requirements. Both narrative descriptions and completion of a detailed documentation inventory of programs is required.

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| PROCESS Reporting for Data Analysis for Labor Market Alignment | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting Stakeholder Engagement Labor Market Alignment | |
| List all stakeholder categories engaged on Labor Market Alignment. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Unmet Labor Market Demand | | | |
| Results Code  (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **After completing the Labor Market Alignment section of this document, list high-wage, high-demand, high-growth occupations identified that you do not currently offer aligned programs for.** (Add rows as necessary by placing your cursor in the bottom right cell and pressing ‘Tab.’) | **List aligned programs you could implement to meet the identified labor market demand.** View CTE Curriculum Frameworks here: <http://www.fldoe.org/academics/career-adult-edu/career-tech-edu/curriculum-frameworks/> | **Priority** (1-5) |
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***Implementation Progress***

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| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | **What the Law Means** |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following:  …  (C) An evaluation of progress toward the implementation of career and technical education programs and programs of study.” | Eligible recipients must identify programs that are at various intermediate stages of implementation and integration into full Programs of Study and Career Pathways. This includes identifying:   * Programs that have yet to be implemented that will meet labor market demand * Programs that have yet to be implemented but that, if implemented, could create full Programs of Study have regional partner eligible recipients that offer programs that could be coupled to create Programs of Study * Programs that have been implemented but do not currently meet all Size, Scope, and Quality criteria |

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| Data Analysis (VOLUNTARY GUIDANCE) | |
| Data Sources and Analyses | **What to Look for in the Data** |
| Select from the following options or add your own.  Incomplete Programs of Study   * Lists of programs offered by your regional secondary or postsecondary partner eligible recipients and enrollment for each of those programs * Credit transfer agreements for the program * Student retention and transfer trend data * Trend data on dual and concurrent enrollment in CTE programs * Definitions used for alignment, dual and concurrent enrollment, academic and technical standards * Florida’s elements of a Program of Study * Advisory committee notes/minutes * Notes on industry participation | **Incomplete Programs of Study**   * Identify programs that you could begin to offer that could pair with programs offered by your regional secondary or postsecondary eligible recipient partners and that would create complete Programs of Study * Identify elements of Programs of Study that could be implemented to create full Programs of Study. Florida’s Programs of Study are comprised of secondary and postsecondary programs that:   + Meet the requirements of the relevant CTE Curriculum Frameworks   + Meet all of the Florida Department of Education’s Size, Scope, and Quality criteria   + Are seamlessly aligned through coordinated, nonduplicative sequences of academic and technical content that progress in specificity   + Offer at least one opportunity within the program of study for accelerated credit through:     - Dual enrollment     - Local or statewide articulation agreement     - Integrated academic courses that include accelerated credit, such as Advanced Placement (AP), International Baccalaureate (IB), or Advanced International Certificate of Education (AICE); or a College-Level Examination Program (CLEP) completed prior to the student graduating from high school   + Are coordinated by an advisory council that includes, at a minimum, representatives from secondary, postsecondary, and business and industry   + Optionally, include aligned middle school CTE programs or allow middle school students to take high-school level CTE programs early |

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| Stakeholder Engagement (VOLUNTARY GUIDANCE) | |
| Stakeholders | **Engagement Strategies** |
| All stakeholders required by law, particularly:   * Secondary teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals * Postsecondary faculty and administrators * Career guidance and advisement professionals * Corrections education staff * Tribal organizations and representatives * Business and community partners * Local workforce development and economic development boards * Students and former students * Representatives of special populations * Data staff | * Work group to examine data including educators, career guidance professionals, business and community leaders * Focus group, interviews, study circle with:   + Students and former students   + Representatives of special populations   + Corrections education staff   + Tribal organizations and representatives   + Business, industry and community partners |
| Questions to Ask | |
| Programs of Study   * How well are your programs/programs of study meeting program quality standards established by [ACTE’s Quality CTE Program of Study Self-evaluation?](https://www.acteonline.org/professional-development/high-quality-cte-tools/)  Where are there gaps or needs to be addressed? * To what degree do your CTE programs of study have intentional course sequences that begin with introductory content and progress to more occupationally specific content? * To what degree do your programs of study have multiple entry and exit points? How does this vary across programs? Do programs incorporate stackable credentials? * How fully are your programs aligned and articulated across secondary and postsecondary education? * Across non-credit and credit programs? Across two- and four-year institutions? * How fully are my programs aligned and articulated across secondary and postsecondary education? * To what degree are you offering programs that are not part of programs of study? Why? * To what degree do secondary students earn dual/concurrent enrollment credit in their program of study? How does this vary across programs? Across student groups? * To what degree do you have credit transfer agreements in place to help learners earn and articulate credit across education levels or between postsecondary institutions? How effectively are these agreements used? If they are not used effectively, why not? How does this vary across programs? Across student groups? * To what degree do you offer integrated academic courses that confer accelerated credit (AP, IB, AICE, CLEP)? * Are there programs of study that are insufficiently coordinated by an advisory council? Are there any programs of study that have insufficient representation from secondary, postsecondary, or business and industry? * To what degree are your learners being retained in the same program of study when they transition between secondary and postsecondary? How does retention vary across programs? Across student groups? | |

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| PROCESS Reporting for Data Analysis for Implementation Progress | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting Stakeholder Engagement for Implementation Progress | |
| List all stakeholder categories engaged on Implementation Progress. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Incomplete Programs of Study | | | |
| Results Code (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **After analyzing a complete list of programs offered by your regional secondary or postsecondary partners, list all programs offered by your regional secondary or postsecondary partners that could be paired with programs from your agency to create Programs of Study.** (Add rows as necessary by placing your cursor in the bottom right cell and pressing ‘Tab.’) | **List aligned programs you could implement to create Programs of Study.** View CTE Curriculum Frameworks here: <http://www.fldoe.org/academics/career-adult-edu/career-tech-edu/curriculum-frameworks/> | **Priority** (1-5) |
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***Faculty and Staff***

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| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | What the Law Means |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following…  (D) A description of how the eligible recipient will improve recruitment, retention, and training of career and technical education teachers, faculty, specialized instructional support personnel, paraprofessionals, and career guidance and academic counselors, including individuals in groups underrepresented in such professions.” | Hiring, equipping, and keeping diverse educational faculty and staff that are able to offer the highest quality CTE to all students is mission critical to Florida’s Career and Technical Education. Eligible recipients must evaluate deficits in their faculty and staff recruitment, retention, and training. |

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| Data Analysis (VOLUNTARY GUIDANCE) | |
| Data Sources and Analyses | **What to Look for in the Data** |
| Select from the following options or add your own.  Recruitment   * Data on faculty, staff, administrator and counselor   + Demographics (gender, race, ethnicity, full/part time, years of teaching experience, etc.)   + Salaries and benefits   + Recruitment methods and sources for current staff   + FDOE secondary reports on District staff salaries, shortages, demographics, certifications, and in-field/out-of-field teaching: <http://www.fldoe.org/accountability/data-sys/edu-info-accountability-services/pk-12-public-school-data-pubs-reports/staff.stml>   + Information on FDOE Secondary Staff Surveys can be found at: <http://fldoe.org/accountability/data-sys/database-manuals-updates/> * Student demographic data * State and/or local policies on educator certification and licensing * Description of recruitment process * Trend data on educator and staff shortage areas in terms of CTE area and demographics (at least past 5-10 years)   Retention   * Data on faculty, staff, administrator, and counselor years of employment in position, profession, and/or eligible recipient * Description of retention process * Trend data on educator and staff retention in terms of CTE area and demographics (at least past 5-10 years) * Survey data from faculty and staff exiting employment   Training   * Data on faculty, staff, administrator and counselor   + Preparation training   + Credentials (State degreed CTE teaching certifications, District-issued CTE teaching certifications, years of industry experience, industry-recognized credentials, number/percent in-field vs. out-of-field teachers, etc.)   + Participation in professional development, mentoring and externships * Description of professional development, mentoring and externship opportunities * Findings from educator evaluations or other resources about impact of professional development, mentoring and externships * Survey or focus group results conducted with educators regarding needs and preferences | **Recruitment**   * Disparities between faculty and staff gender, race, and ethnicity demographics and that of the student body’s * Disparities in the distribution of compensation * Positions that will require additional focus to develop or recruit for effectively * Positions needing to be created * Effective means of recruitment * Ineffective means of recruitment * Recruitment delays, barriers, redundancies, and inefficiencies   **Retention**   * Positions with high turnover * Trends in average employment duration by CTE area and demographics * Patterns of feedback on reported reason for exiting employment   **Training**   * Areas of faculty/staff underperformance * Faculty/staff knowledge/skill gaps * Unsupplied training and support * Ineffective training and support |

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| Stakeholder Engagement (VOLUNTARY GUIDANCE) | |
| Stakeholders | **Engagement Strategies** |
| All stakeholders required by law, particularly:   * Secondary teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals * Postsecondary faculty and administrators * School District certification staff, where applicable * Human Resource department members * Representatives of special populations * Corrections education staff * Data staff | * Work group to examine data including educators, career guidance professionals, and human resources staff * Focus group, interviews, study circle with:   + Veteran teachers   + Developing teachers   + Individuals charged with selecting, designing and implementing professional development   + Human resource staff |
| Questions to Ask | |
| Select from the following options or add your own.  Recruitment   * To what degree do you currently have sufficient faculty and staff (including instructors, support staff, guidance and advisement professionals, administrators and other key staff) to offer high-quality programs of study and career development? * To what degree do you anticipate needing additional faculty and staff (including instructors, support staff, guidance and advisement professionals, administrators and other key staff) to offer high­ quality programs of study and career development in the short, medium and long terms? * To what degree are faculty teaching your programs adequately credentialed? And to what degree do they have adequate workplace experience in the program area? * How diverse is your faculty and staff? To what degree does it reflect the demographic makeup of your student body? What are the root causes of any gaps? What processes are in place to recruit new educators? * What processes are in place to recruit faculty and staff? Are these processes efficient and effective, especially for instructors coming from industry? * What recruitment method have produced the highest quality new hires? The most new hires? * What untried recruitment methods could yield high-quality new hires (competitive pay, incentive programs for retired teachers returning to the profession, co-teaching, part-time/adjunct CTE instructors, hiring fairs, online postings, “grow your own” teacher programs, etc.)? * What positions or subject areas have been the most difficult to develop or recruit for? * In what subject areas do you need to develop or recruit faculty and staff due to looming retirements, growing student interest and/or emerging priority employment areas? * Is there a process to develop or recruit CTE instructors from existing staff?   Retention   * What processes are in place to induct and retain faculty and staff? Are these processes efficient and effective, especially for instructors coming from industry? * How would faculty and staff describe the collegial tone, atmosphere, and work environment? * Do faculty and staff feel that there are adequate opportunities to grow and advance? * To what degree do staff and faculty feel that they are overworked? If overworked, which job tasks could be made more efficient or redistributed?   Training   * To what degree do you offer regular, substantive professional development opportunities for faculty, staff and administrators? How effective are these experiences at improving student outcomes? * To what degree do faculty, staff and administrators have opportunities to work with and learn directly from representatives of business and industry? * To what degree do faculty, staff and administrators have opportunities to work with and learn directly from their peers in formal or informal professional learning communities? * What specific supports are available for faculty and staff from under-represented groups? * What professional development offerings are most highly rated by participating faculty, administrators and staff? Why? * What do faculty, staff and administrators report as needs and preferences for professional development, benefits and supports? * Have secondary non-degreed teachers of career education have received adequate training in the four required professional education training - teaching methods, course construction, lesson planning and evaluation, and teaching special needs students (The 2018 Florida K-20 Education Statues Code; Chapter 1012; Section 1012.39)? * Have CTE instructors received adequate training on the integration of math, language arts, and/or science into relevant lessons? * Have CTE instructors received adequate training on project-based learning, work-based learning, and contextualized instruction? * Have CTE instructors and academic teachers and coaches been collaborating (e.g., shared planning, correlated lessons, team teaching, etc.)? * Is there active, regular, and two-way communication between   1. CTE instructors and administrative staff?   2. Secondary and postsecondary CTE instructors?   3. CTE instructors and business/industry representatives?   4. CTE instructors and academic instructors? * Do instructors maintain membership in related state and national professional development organizations? * Do instructors strive to upgrade skills and knowledge by attending conferences, conventions, college courses, staff development, inservice training, and/or other sources of professional development? * What has been the impact on mentoring and onboarding processes for new instructors, especially instructors coming from industry? | |

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| PROCESS Reporting for Faculty and Staff Data Analysis | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting for Faculty and Staff Stakeholder Engagement | |
| List all stakeholder categories engaged on CTE faculty and staff needs. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Planning and Budgeting for Faculty and Staff | | | | | |
| Results Code  (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Need**  (Include needs for all three: recruitment, retention, and training) | **Root Cause**  (See Process Overview section for techniques.) | **Consequences of Not Addressing** | **Difficulty to Correct** (High, Medium, Low) | **Priority** (1-5) |
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***Equity and Access***

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| Perkins V Law - Section 134(c)(2) | |
| What the Law Says | **What the Law Means** |
| “(2) REQUIREMENTS.--The comprehensive local needs assessment described in paragraph (1) shall include each of the following…  (E) A description of progress toward implementation of equal access to high-quality career and technical education courses and programs of study for all students, including—  (i) strategies to overcome barriers that result in lower rates of access to, or performance gaps in, the courses and programs for special populations;  (ii) providing programs that are designed to enable special populations to meet the local levels of performance; and  (iii) providing activities to prepare special populations for high-skill, high-wage, or in-demand industry sectors or occupations in competitive, integrated settings that will lead to self-sufficiency.” | While the Student Performance section of this document had a special population performance focus, this portion of the Law focuses on evaluating the barriers and opportunities that influence that performance as well as access to enroll in CTE. The focus is on “strategies” “programs,” and “activities that allow full participation in all forms of CTE, particularly those leading to competitive, integrated, high-skill, high-wage, in-demand occupations. Additionally, the focus is on taking active measures to achieve continuous improvement or “progress towards” equal access. |

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| Data Analysis (VOLUNTARY GUIDANCE) | |
| Data Sources and Analyses | **What to Look for in the Data** |
| Select from the following options or add your own. [Additional guidance available by NAPE.](https://www.napequity.org/nape-content/uploads/NAPE-Perkins-V-Local-Equity-Gap-Analysis-At-A-Glance_Updated_4-3-19_ml_bw.pdf)   * Program promotional materials * Recruitment activities for each special population * Career guidance activities for each special population * Processes for communicating and providing accommodations, modifications and supportive services for special populations * Available services to support all students, including special populations * Procedures for work-based learning for special population students * Information on accelerated credit and credentials available for special populations * Data on CTE participation and performance by each career area and each special population * Data on participation in CTSO in terms of special populations * Documentation from the results section of the Student Performance * Results from the Size, Scope, and Quality section * Results from surveys/focus groups with student, parents and/or community representatives of special populations. | **Barriers to Access**  Definition of access for special populations: Implementing strategies and policies to provide the resources, social services, and academic support that certain students need to succeed in school. This can include the removal of barriers, both intentional and unintentional that prevent some students from equitable participation in programs.   * Enrollment Gaps: Compare the percent enrollment of special populations in CTE to the percent enrollment of special populations across all enrollment. Look for both over enrollment and under enrollment. Perform this same comparison by program. Then perform root cause analysis. [NAPE says that](https://www.napequity.org/nape-content/uploads/NAPE-Perkins-V-Local-Equity-Gap-Analysis-At-A-Glance_Updated_4-3-19_ml_bw.pdf), “When looking at participation rates the standard civil rights monitoring gap that is a flag for potential access discrimination is a 10% participation gap. For comparison groups with small numbers you may use smaller comparison percentages or even numeric rather than percentage comparisons. These gaps can show subgroups who are over-represented or under-represented, and both should be addressed in the gap analysis.” * Ineffective Measures: identify current special population recruitment efforts, including career guidance practices, that have not yielded significant special population access improvement * Underutilized Measures: identify current special population recruitment efforts that have been shown to be effective but are underutilized   **Barriers to Performance**  Definition of equity for special populations: Utilizing resource distribution to ensure that students have access to high quality instruction, services, and support resources based on the diverse needs of their students, with the aim of ensuring that all students are able to be successful.   * Performance Gaps: identify special population performance gaps and their root causes (see Student Performance section) * Ineffective Measures: identify strategies, programs, and activities that you have implemented that have yet to cause progress towards closing special population performance gaps * Underutilized Measures: identify current special population performance improvement measures that have been shown to be effective but are underutilized   **Barriers to Retention - Concentration and Completion**   * Completion Gaps: identify special population gaps in concentration and completion as compared to non-special populations * Ineffective Measures: identify retention strategies, programs, and activities that you have implemented that have not yet reduced gaps in special population concentration and completion rates * Underutilized Measures: identify current special population retention measures that have been shown to be effective but are underutilized |

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| Stakeholder Engagement (VOLUNTARY GUIDANCE) | |
| Stakeholders | **Engagement Strategies** |
| All stakeholders required by law particularly:   * Secondary teachers, career guidance and academic counselors, principals and other school leaders, administrators, and specialized instructional support personnel and paraprofessionals * Postsecondary faculty and administrators * Corrections education staff * Tribal organizations and representatives * Representatives of special populations * Representatives of regional or local agencies serving out-of-school youth, homeless children and youth, and at-risk youth * Data staff | * Work group to examine data including educators, career guidance professionals, representatives of special populations. * Focus group, interviews, study circle with:   + Students and former students   + Parents   + CTSO advisors   + Representatives of special populations   + Corrections education staff   + Tribal organizations and representatives   + Business, industry and community partners |
| Questions to Ask | |
| Select from the following options or add your own.   * To what degree are student groups taking part in CTE at disproportionate levels, in comparison to the overall student population, at the eligible recipient and program levels? Which groups are over- and under-represented, particularly in programs leading to high-skill, high-wage or in­ demand industry sectors or occupations? What are the root causes of these gaps? * What efforts have been made to recruit and retain diverse populations of learners into your programs, particularly in programs leading to high-skill, high-wage or in-demand industry sectors and occupations? Which ones have been most and least effective? Which ones are under-used? * What barriers (such as prerequisites/admission requirements, transportation, child care or scheduling) prevent certain populations of learners from accessing your programs? Which student groups are most affected by these barriers? * What barriers prevent certain populations of learners from taking part in embedded activities such as work-based learning, accelerated credit (including dual enrollment) and CTSOs? What are the root causes of these barriers? Which student groups are most affected by these barriers? * How and when do you recruit students into your programs? Are you reaching all students, including students from groups identified as special populations? Consider where and how you conduct outreach. * To what degree do students have access to career guidance that is comprehensive, equitable and unbiased? * To what degree do faculty and staff have access to professional development on providing instruction, career development and other services to students in an equitable, unbiased manner? * What differentiated accommodations, modifications and supportive services do you currently provide to ensure the success of special population groups? Which ones have been most and least effective? Which ones are under-used? To what degree do these supports align with student Individualized Education Plans? * What additional accommodations, modifications and supportive services would help ensure access and equity for all students within your programs? * What additional resources, such as WIOA Title I funds or Pell grants, might be available to support certain learners? * How are you aligning with other federal or state programs, such as Temporary Assistance for Needy Families or SNAP Employment & Training, to ensure that CTE students can access additional supports that may be available? | |

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| PROCESS Reporting for Data Analysis for Equity and Access | |
| List all data sources used. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe how each data source was analyzed.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| PROCESS Reporting Stakeholder Engagement for Equity and Access | |
| List all stakeholder categories engaged on Equity and Access. (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Describe the method of how each stakeholder category was engaged.** Provide enough detail that your notes can be used to replicate your process during future CLNAs as well as provide details for audit/review purposes. |
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| RESULTS for Planning and Budgeting for Equity and Access | | | | | |
| Results Code  (Add rows by placing cursor in the bottom right cell and pressing ‘Tab.’) | **Need**  (Include needs for all three: recruitment, retention, and training) | **Root Cause**  (See Process Overview section for techniques.) | **Consequences of Not Addressing** | **Difficulty to Correct** (High, Medium, Low) | **Priority** (1-5) |
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***Summary of CLNA Toolkit Edit History***

Changes published on 11/8/2019 for Vrs. 2.1 of the CLNA Toolkit:

* The “Important Note – Guidance vs. Requirements/“Toolkit” vs. “Template”” section was added to contrast the “Toolkit” with the now released CLNA Templates and narrative requirements.
* The explanation of Labor Market Alignment documentation was removed and redirect was given to complete labor market alignment requirements separately using the FDOE provided templates and requirements overview.
* A redirect was added to the Size, Scope, and Quality section to complete the documentation requirements using the FDOE templates and requirements overview.
* Portions from the Implementation Progress section were moved up into Labor Market Alignment and Size, Scope, and Quality to aid voluntary assessment and documentation of results for those sections.

Sincere gratitude is expressed to AdvanceCTE, ACTE, and Steve Klein for the quality of their work on Perkins Comprehensive Local Needs Assessments. Their work contributed significantly to the formation of this document.

1. Perkins V Sec. 3(12) CTE CONCENTRATOR.—The term ‘CTE concentrator’ means—… (B) at the postsecondary level, a student enrolled in an eligible recipient who has—

   (i) earned at least 12 credits within a career and technical education program or program of study; or (ii) completed such a program if the program encompasses fewer than 12 credits or the equivalent in total. [↑](#footnote-ref-1)