Indiana Department of Workforce Development
Office of Career and Technical Education

# CAREER AND TECHNICAL STUDENT ORGANIZATION— INDIANA BUSINESS PROFESSIONALS OF AMERICA (BPA) GRANT

Competitive Grant Application

**Information and Application Instructions**

| | |
|---|---|
| Issue Date | December 18, 2009 |
| **Application Due Date** | **January 8, 2010, 2:00 P.M.** |
| Awards Announced | January 15, 2010 |
| Grant Start Date | January 15, 2010 |
| Grant End Date | June 30, 2011 |
| Final narrative report due | July 31, 2011 |
| Final expenditure report due | August 31, 2011 |

**Total Funds Available: $130,000**
The grant will begin January 15, 2010 and end June 30, 2011. It may be renewed for operation in FY 2012 and 2013 at the Department's option.

Direct questions regarding this competitive grant application to:

Melissa Wafford
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317-234-4106

# General Instructions

The purpose of this competitive grant application process is to obtain applications for the Indiana Department of Workforce Development, Office of Career and Technical Education, to provide for statewide management and leadership of the secondary Indiana BPA student organization.

The Indiana BPA student organization provides students and teachers with activities and programs that help students develop skills and competence for pursuing careers in business management, office administration, information technology and other related career fields.

Statewide leadership is needed to promote coordination and collaboration among local schools, business and industry, teacher education institutions, and other appropriate agencies.

The Indiana Department of Workforce Development has identified the need to continue funding statewide leadership for BPA and, therefore, is soliciting an agency to provide statewide leadership and a management structure for this organization in Indiana.

**BACKGROUND**
Indiana Career and Technical Student Organizations (CTSOs) are an integral part of career and technical education programs. Integration of CTSOs into career and technical education programs expands the educational experiences of students, enabling them to more effectively reach their occupational goals. The goals of Indiana BPA are to contribute to the preparation of a world-class workforce through the advancement of leadership, citizenship, academic, and technological skills.

**GRANT AMOUNT**
Funds in the amount of $130,000 are budgeted for the first two years of the grant. However, the grant is competitive and the amount finally approved may be less than the total estimated.

**TIMELINE**
The grant will begin January 15, 2010 and end June 30, 2011. It may be renewed for operation in FY 2012 and 2013 at the Department's option.

**ELIGIBLE APPLICANTS**
It is anticipated that a single grant will be awarded to the applicant that best meets the application criteria. Grant applicants may be private, public or non-profit entities.

**STATE STAFF, ROLES, AND RESPONSIBILITIES**
Department responsibilities include:
1. A project monitor who will provide timely response to the grantee's request for consultation on issues that may arise; and
2. A project monitor who will meet quarterly to discuss progress with project deliverables.

**STATEMENT OF WORK AND DELIVERABLES**
The overall objective of this competitive grant is to provide for statewide management and leadership of the secondary Business Professionals of America (BPA) student organization. The following are included in the scope of this project however applications may specify additional forms of training, technical support and assistance to be provided by the grantee:

**<u>Grantee Scope of Work</u>**

The following are included in the scope of this project:
1. Expand and manage current chapters and establish new chapters to enable local chapters to operate as part of the career and technical education curriculum.
2. Prepare and disseminate materials to chapters and communicate information about Indiana BPA to appropriate individuals and groups.
3. Plan, conduct, and evaluate in-service and pre-service activities for career and technical education instructors who are serving or preparing to serve as an advisor of a local chapter.
4. Plan and manage a leadership training program that includes student participation in occupational events and leadership events at the district/regional, state, and national levels.

5. Plan and conduct a competitive events program that includes student participation in occupational events and leadership events at the district/regional, state, and national levels.
6. Secure support of business, industry, labor, education, and foundations to provide direction and financial assistance for Indiana BPA activities.
7. Plan and conduct special activities, as needed by Indiana BPA.

**Deliverables**

The grantee will provide the following:

- Activities carried out to support current chapters and establish new chapters as specified below:
    - Distribution of rosters to all chapters and others as requested.
    - Distribution of information packets as requested or needed
    - Up-to-date directory of chapters and advisors.
    - Distribution of informational packets to new chapters
    - Student membership increased by 2% over previous year.
    - (optional) Coordination of alumni activities.
- Information about Indiana BPA shared to promote the organization as specified below:
    - Brochure, handbook, and other materials.
    - Up-to-date annual calendar of activities prepared and distributed to all members/ chapters.
- Website updated monthly with minimum of the following elements: Mission, Goal, or Purpose Statement, Calendar, Membership information, Link to national chapter, Competition Information, State Director Contact Information.
- In-service and pre-service activities for Indiana BPA instructors serving or preparing to serve as a local chapter advisor conducted as specified below:
- Update session(s) conducted with local advisors.
- In-service and pre-service updates conducted with teacher educators and evaluated.
- Chapter management in-service for new advisors held and evaluated.
- All those requesting mentoring paired with experienced advisors and network development activities conducted (including promotion of the network).
- State advisory council/board utilized to provide assistance and evaluation of organization's activities.
- Leadership training program maintained that includes student participation in occupational events at the district/regional, state, and national levels as specified below:
    - Quality leadership activities conducted for state officers.
    - Quality leadership activities conducted for local chapter officers.
    - State officer meetings conducted.
    - Linkage with national organization maintained.
    - (optional) Archives maintained
- Competitive events program includes student participation in occupational and leadership events at the district/regional, state, and national levels as specified below:
    - Up-to-date list of occupational events and leadership opportunities distributed to members and chapters.
    - Annual state conference planned and directed.
    - State participation in annual national conference competently planned and directed.
    - (optional) Assistance with planning or conducting regional or district competitive event conferences provided.
    - (optional) Coordination of participation in multi-state regional leadership conference accomplished.
- Support from business, industry, labor, education, and foundations secured to provide direction and financial assistance Indiana BPA activities as specified below:
    - Business, industry, labor, education board established and appropriately utilized for assistance.
    - Financial and in-kind support from business, industry, labor, education, and foundations increased by 2% per year.
    - Collaborative agreements with business, industry, labor, education, and foundations established and maintained.
    - (optional) Organization incorporated.
    - (optional) Scholarships obtained.

- Financial business of Indiana BPA managed and conducted in accordance with all local, state, and federal laws and with recognized accounting principles including:
    - Appropriate accounting records maintained.

- Completed annual budget form including all revenue and expenses.
- Completed final financial status report form including all revenue and expenses.
- Report of financial reports filed.

- Special activities needed by Indiana BPA planned and conducted, as needed.

**Reports**

Quarterly narrative and final narrative and financial reports are required and must be submitted to the Indiana Department of Workforce Development within 30 days of the end of each quarter and within 30 days of the end of the fiscal year. The table below specifies the reporting period and due date for each required report:

| Reporting Period | Dates | Report Due Date |
|---|---|---|
| 1st Quarter | Jan 1 – Mar 31 | Apr 30 |
| 2nd Quarter | April 1 – Jun 30 | July 31 |
| 3rd Quarter | July 1 – Sept 30 | Oct 31 |
| 4th Quarter | Oct 1 – Dec 31 | Jan 31 |
| End of FY 2010 | Jan 1 – Dec 31 | Jan 31 |
| 1st Quarter – Year 2 | Jan 1 – Mar 31 | Apr 30, 11 |
| 2nd Quarter – Year 2 | Apr 1 – Jun 30 | July 31, 11 |
| End of Grant | Jan 1, 10 – Jun 30, 11 | July 31, 11 |

Failure to submit required reports by the due date specified will result in a halt to further disbursement of funds until the appropriate reports have been received and accepted by the Department of Workforce Development.

Report narratives must address each of the deliverables set forth in the work plan and provide the information to support accomplishment of the deliverables. Reports should provide the following types of information, "what," "when," "how many," "where," and "to whom." Examples of information to include in reports: a) numbers of materials developed and distributed, b) last revision or update of rosters, informational materials, etc, c) number of members or chapters served, d) funds raised, e) number, location and audiences for meetings held, f) findings of any evaluations conducted, g) list of competition winners by event and award, h) evidence of collaboration, participation, and consultation with business, industry, labor, and education in the form of letters of support or formal agreements (where appropriate).

Because of the complexity of the deliverables, there will be some activities conducted within each objective during each quarter throughout the entire year. All functions set forth in the work plan must be addressed in each report. Deliverables, for which there were no activities in a given reporting period, should be listed with the indication "no activity this quarter."

**ISSUE MANAGEMENT**

Grantee will report issues and problems to project monitor at least according to the schedule specified under 'Reports.' Any issue or problem, which endangers the integrity or timeline of the project, will be reported to the project monitor immediately and grantee will be prepared to implement back-up plan as specified under Grantee Responsibilities. Grantee will provide a summary of the issue(s) and proposed solutions in writing to the project monitor. Project monitor will provide direction to grantee in implementing solutions to resolve issues. Grantee is responsible for producing deliverables according to the timeline and failure to meet the terms of the grant agreement may result in withholding of a portion of the grant funds or termination of the grant.

**CLOSING DATE AND SUBMISSION INSTRUCTIONS**

Submit the original copy bearing ORIGINAL signatures and three (3) additional copies of application in accordance with the following instructions:

1. Applications **MUST BE RECEIVED AND TIME-STAMPED IN the at the Department of Workforce Development ON OR BEFORE 2:00 p.m. on Friday, January 8, 2010.** APPLICANTS ARE RESPONSIBLE FOR TIMELY RECEIPT OF THEIR APPLICATION. APPLICATIONS WHICH ARE RECEIVED AFTER THE SPECIFIED DUE DATE AND TIME CANNOT BE CONSIDERED. Late applications will not be accepted or considered except under the following circumstances: (a) applications received on time do not meet application criteria, or (b) no other applications are received.

2. Each envelope/container submitted must contain only one application. Do not submit more than one application in one envelope/container. Also, faxed applications will not be accepted.

3. APPLICANTS ARE RESPONSIBLE FOR ASSURING THAT THE FOLLOWING IDENTIFYING INFORMATION APPEARS ON THE OUTSIDE ENVELOPE: The Date Due; and Applicant Name and address. If a delivery service is used which prohibits such markings on their envelope or package, this information must be placed on the outside of an interior envelope or package.

4. The application may be submitted utilizing one of the methods below:
   a. Applications may be delivered to the receptionist desk of the Department of Workforce Development (10 N. Senate Avenue, Indianapolis, IN 46204-2277).
   b. The Department of Education address for applications submitted by US POSTAL SERVICE, CONTRACT CARRIER, COURIER DELIVERY, or PERSONAL DELIVERY, is:

State of Indiana
Department of Workforce Development
Career and Technical Education
2nd Floor,
10 N. Senate Avenue
Indianapolis, Indiana 46204
Attn: Melissa Wafford

The tentative time frame for the operation of this grant program includes these major milestones:

| | |
|---|---|
| Jan. 8, 2010 | Applications due |
| Jan. 15, 2010 | Awards announced |
| Jan. 15, 2010 | Grant start date |
| June 30, 2011 | Grant end date |
| July 31, 2011 | Final narrative report due |
| August 31, 2011 | Final expenditure report due |

**Rejection of Applications**
The Department of Workforce Development reserves the right to reject any and all applications received as a result of this announcement.

**Application Format**
The following information must be included in all applications. These factors will be used in evaluating each application. Applications should be formatted to include each of the following sections, which should be clearly identified with the appropriate headings, in the following order:

1. Statement of the problem: Describe the problem addressed by the application. Demonstrate an understanding of the problem well beyond a reiteration of that stated in the competitive grant application instructions. Statement should be logical, coherent, and appropriate to the work plan proposed.

2. Capabilities and qualifications of organization: State the full name and address of your organization and, if applicable, the branch office or other subordinate elements that will perform, or assist in performing, the project described in the application. Applicants must demonstrate their ability to handle a project of this size and scope.

   Prior experience: Indicate the prior experience of your organization which you consider relevant to your ability to successfully manage the project described in competitive grant application instructions. Include sufficient detail to demonstrate the relevance of such experience. Applications submitted should include, in this section, descriptions of qualifying experience to include project descriptions, costs, and starting and completion dates of projects successfully completed. Also, include the name, address, and phone number of the responsible official of the client organization who may be contacted.

   - Qualified personnel/staffing: The grantee must be able to provide appropriate staff to properly service this project.

   The application should indicate the competence of personnel whom the applicant intends to assign to the project. Qualifications will be measured by education and experience, with particular reference to experience on projects similar to that described in the application instructions.

3. Work plan and deliverables: Describe in narrative form your plan for accomplishing the objectives described in the Statement of Work. Explicitly address, in order, how you will carry out activities to achieve each objective and minimum outcome specified.

4. Budget: Use the format outlined below to provide your proposed budget:

   Activity description should be detailed enough for the State to ascertain that no funds are being utilized for disallowed expenditures and that activities meet the general Perkins guidelines. Additionally, the budget description for that activity should be specific enough for DWD to comprehend what the money is being used for.

   Examples: Salaries- must indicate how many positions are being funded, if they are full/ part-time, and the functions associated with that position.

   **Disallowed Expenditures**
   Activities that support the following broad categories are not allowed at the local level:
   - Remedial Courses
   - Student expenses or direct assistance to students
   - Entertainment
   - Awards, plaques and memorabilia
   - Individual memberships
   - Memberships or anything related to lobbying
   - College tuition, fees, books
   - Fines and penalties
   - Expenses that supplant
   - Audits except single audit
   - Contributions and donations
   - Facilities and furniture - specialty items specific to CTE instruction is allowed
   - Alcohol
   - Fundraising
   - General administration apart from program administration must be for CTE
   -Advertising including promotional favors such as bumper stickers, pencils, pens or T- shirts, newspaper, portfolios with school name, etc.

   Perkins budgets have several primary categories. Institutions need to establish accounts consistent with these categories so Perkins funds can be properly identified and required reports submitted.

   - **Administration**
     Limited to 5% of total grant amount
     Limited to functions required to execute the grant and should not include any program activities; must be an allowable expense

   - **Salaries/Fringe Benefits**
     Employee full/part-time
     Benefits to include health insurance, FICA, retirement, etc.

   - **Travel**
     Travel/mileage reimbursement for conferences, trips to businesses, schools, etc. for support of CTE programs

   - **Contractual Services**
     May include consultants, honorariums, software lease, and other contract services

   - **Equipment**
     Equipment purchased must show evidence of benefit to CTSO programs
     Equipment products with a useful life expectancy of 1 year or more and an original cost of $500 or more.
     Equipment purchases that are $500 or above require state tags

   - **Materials/Supplies**

Consumable products, under $500 and with a life expectancy of 1 year or less. This includes telephone, postage, duplicating, copying, folders, paper

- **Miscellaneous**
  Items that do not fit in any of the categories above that meet the allowable expenses set forth by Perkins. These can include non-contractual fees and travel paid directly to individual consultants, postage, printing and publications, equipment rentals/lease, etc**.**

**SELECTION OF THE AWARD RECIPIENT**

In awarding this grant, applications will be evaluated by a review committee (chaired by DWD) based on the following factors:

| | | **Weight** |
|---|---|---|
| 1. | Statement of the Problem | 5 points |
| 2. | Capabilities and Qualifications of Organization/Prior Experience | 15 points |
| 3. | Qualified Personnel/Staffing | 20 points |
| 4. | Work Plan and Deliverables | 50 points |
| 5. | Budget | 10 points |
| **TOTAL** | | **100 points** |

Grant awards will be based on merit and quality as determined by points awarded. Following are the review criteria to be used to evaluate applications:

| **Part** | **0** | **1** | **2** | **3** | **4** | **5** |
|---|---|---|---|---|---|---|
| Statement of the Problem (5 points) | Application does not address | Minimal description of the problem. Demonstrates little to no additional understanding beyond narratives in application instructions. Description is vague or lacks logic. Not appropriate to work objectives proposed. | | Demonstrates conventional understanding of the problem. Is generally logical and coherent. Statement is generally appropriate to the work objectives proposed. | | Demonstrates an extensive understanding of the problem and an understanding of the broader context of the project. Highly logical and coherent. Completely appropriate to the work objectives proposed. |

| Part | 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|
| Capabilities and Qualifications of Organization/Prior Experience (15 points) | Application does not address | Little to no prior experience relevant to the current project. Descriptions of qualifying prior experience lack one or more details such as project descriptions, costs, dates or contact information for client organization or descriptions are not relevant to current project. | | Previous experience with two or three projects of similar size and scope relevant to the current project. Descriptions of qualifying prior experience include all details of project descriptions, costs, dates and contact information for client organization and are relevant to the current project. | | Previous experience with more than three projects of similar size and scope relevant to the current project. Descriptions of qualifying prior experience include all details of project descriptions, costs, dates and contact information for client organization and are highly similar to the current project. |
| Qualified Personnel/Staffing (20 points) | Application does not address | Staff expertise in the areas specified in item 3 under “application format” of grant application instructions is minimal. Resumes not provided for all key staff persons or one or more required details not provided on resumes. Information on proposed subcontractors incomplete or missing. | | Proposed staff are qualified in all areas specified in item 3 under “Application Format” of grant application instructions. Resumes are provided for all key staff persons and all required details are provided on resumes. Information on any proposed subcontractors is complete. | | Proposed staff are qualified and extensively experienced in all areas specified in item 3 under “Application Format” of grant application instructions. Resumes are provided for all key staff persons and all required details are provided on resumes. Information on any proposed subcontractors is complete. |

| Part | 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|
| Work Plan and Deliverables (50 points) | Application does not address | Work plan is unclear or incomplete. Description of what will be done and how it will be done is unclear and lacking in specifics.<br><br>Activities are vague and not clearly tied to the specified outcomes.<br><br>Details of project plan and timeline are minimal or absent.<br><br>Description of progress and final reports is minimal or absent.<br><br>Evaluation plan is minimal or absent or not appropriate to the work. No rationale for design of evaluation plan is proposed.<br><br>Proposed approach to project management including management of foreseen and unanticipated issues and change management is vague or absent. | | Work plan describes activities to be carried out to achieve each objective and minimum outcome specified in grant application instructions. Provides a description of what will be done and how it will be done for every objective.<br><br>Activities are complete, appropriate to the objectives of the grant and tied to the specified outcomes.<br><br>Project plan and timeline are provided.<br><br>Description of progress and final reports are provided.<br><br>An evaluation plan appropriate to the work and rational for the design is proposed.<br><br>Proposed approach to project management including management of foreseen and unanticipated issues is clear and appropriate. Proposed approach to change management is described and appropriate. | | Work plan clearly and explicitly describes activities to be carried out to achieve each objective and minimum outcome specified in grant application instructions. Provides a complete description of what will be done and how it will be done for every objective.<br><br>Activities are specific, unambiguous, complete, appropriate to the objectives of the grant and clearly tied to the specified outcomes.<br><br>Details of project plan and timeline are specific. Project breakdown shows activities, tasks and resources.<br><br>Content, format and timetable of progress and final reports are described.<br><br>A formative/summative evaluation plan appropriate to the work and adequate rationale for the design is proposed.<br><br>Proposed approach to project management including management of foreseen and unanticipated issues is clear, detailed and appropriate. Proposed approach to change management is clearly described and appropriate. |

| Part | 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|
| Budget (10 Points) | Application does not address | Budget for personnel costs lacks required details such as rate per hour, breakdown by salary and benefits, percent effort for each individual or is otherwise vague, confusing or unclear.<br><br>It is unclear what will be purchased, how the items relate to project objectives, and/or costs appear excessive or unjustified.<br><br>Travel costs are not itemized and/or link to specific project objectives is absent or unclear. Travel costs and per diem are not shown separately. Rates and multipliers are not shown and/or it is unclear how totals were arrived at.<br><br>Equipment costs are not itemized or are unclear, costs appear to be excessive or unjustified and/or need and/or link to specific project objectives is absent or unclear.<br><br>Miscellaneous costs are not itemized and/or are inappropriate to this category.<br><br>Need for indirect cost is not addressed or is unclear. General and administrative burden or overhead is exceeds allowable amount. | | Budget uses format outlined in application instructions.<br><br>Personnel costs are itemized, reasonable and show, by individual: name and title, estimated hours, rate per hour, salary and benefits costs (separately), and percent effort.<br><br>Supplies and materials are itemized, reasonable and appropriate to project objectives.<br><br>Travel costs are itemized by person and task and linked to project objectives. Travel costs and per diem are shown separately. Rates and multipliers are shown and it is clear how totals were arrived at.<br><br>Equipment costs are itemized, appear reasonable and are linked to project objectives.<br><br>Miscellaneous costs are itemized and appropriate to this category.<br><br>General and administrative burden or overhead is limited to eight percent of direct costs or restricted rate (LEA/ISD). Need for indirect cost is clear.<br><br>Costs are reasonable and represent a good value for the price | | Budget uses format outlined in application instructions.<br><br>Personnel costs are clear, specific, reasonable, itemized and show, by individual: name and title, estimated hours, rate per hour, salary and benefits costs (separately), and percent effort.<br><br>Supplies and materials are itemized, detailed and specific and reasonable and appropriate to project objectives.<br><br>Travel costs are specific, itemized by person and task and clearly linked to specific project objectives. Travel costs and per diem are shown separately and are clear. Rates and multipliers are shown and it is clear how totals were arrived at.<br><br>Equipment costs are itemized, supported as reasonable through justification, and need is apparent and linked to specific project objectives.<br><br>Miscellaneous costs are itemized, detailed and clearly appropriate to this category.<br><br>General and administrative burden or overhead is limited to eight percent of direct costs or restricted rate (LEA/ISD). Need for indirect cost is clear and justification is provided in detail.<br><br>Costs are reasonable and represent an exceptional value for the price |

## Budget Activities

### In this section please cover all activities for which you are requesting Perkins funding

***Please copy this page as needed until all district activities funded by Perkins are explained.***

Activity Name: _____

Total Perkins Funding Planned for Activity: $_____

| **Type of Expense and Amount** | **Amount** |
|---|---|
| Salaries- Total Number of Staff- ( ) | |
| Fringe Benefits | |
| Contractual Services | |
| Travel | |
| Materials/Supplies | |
| Miscellaneous-Please Specify- | |
| Equipment | |
| Professional Development | |
| | |
| **Total** | |

**Activity Narrative:**

# Summary Budget

| Categories | Perkins Funds Amount |
|---|---|
| 1 Administration | 0.00 |
| 2 Salaries/Benefits | $0.00 |
| 3 Contractual Services | $0.00 |
| 4 Travel | $0.00 |
| 5 Materials/Supplies | $0.00 |
| 6 Miscellaneous | $0.00 |
| 7 Equipment Purchase | $0.00 |
| **TOTAL** | **$0.00** |