



# Career and Technical Education Incentive Grants: Best Practices

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# About Our Technical Assistance

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1. **Overview and Onboarding** – provides program context. It's ideal for newly assigned staff or those who missed the training earlier.
2. **Document Preparation** – provides details needed to submit required documents and can reduce ineligible claims or claims that need correcting.
3. **Best Practices** – provides tips and resources to manage program use.
4. **Annual Claim Submission Process** – helps staff submit high-quality claims and reduce denied claims. Released each June.
5. **Correcting and Verifying CTE Incentive Grant Claims** – provides details on how to use the claims portal editing and verification features.



# Session Purpose

Transitions

Staff turnover

Internal  
communications

Communication  
with program lead



# Agenda

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- Managing your district's local program.
- Planning for transition and succession.
- Quality control checklist.
- Resources.



# Overview

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## Program best practices:

- Create a CTE Incentive Grant folder.
- Create a calendar-based work plan.
- Create a secure subfolder for confidential records.
- Create a local Onboarding CTE Incentive Grant Staff Toolkit.
- Plan for easy succession or temporary duties.
- Use electronic calendars.
- Use a quality control checklist.



# Common Folder

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Create a **CTE Incentive Grant folder** and save it among common records.

- Consider including:
  - Program records including email, meeting notes, local decisions.
  - Saved final verification reports.
  - CTE work plan and electronic calendar.
  - Secure sub-folder for confidential records.
  - Checklist of annual tasks so that all CTE Incentive Grant staff know the status of each task.
  - Resources and contact information.
  - Onboarding toolkit tailored to your district's resources and needs.
- Identify staff members who will have access.



# Work Plan

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Create a **calendar-based work plan** with responsibilities.

1. Set short- and long-term goals.
2. List all CTE Incentive Grant tasks and craft benchmarks.
3. Assign responsibilities.
4. Place tasks and assignments on common electronic calendar.
5. Add dates of events, conferences, vacations, leave time, deadlines, etc.
6. Schedule periodic meetings of CTE Incentive Grant staff.
7. Store work plan in common records area folder.
8. Assign owner of the plan.
9. Review regularly and revise when needed.



# Secure Subfolder

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Create a CTE Incentive Grant **secure subfolder** within the CTE common folder.

- Consider the following:
  - A personally identifiable information (PII) policy.
    - District's expectations, rules, policies.
    - Process to remove or add program staff access.
  - Student certificates and other claim documentation.
- Limit access to only those responsible and their supervisor.





# Onboarding Toolkit

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Create onboarding CTE Incentive Grants staff toolkit.

- Store in the **common folder**.
- Assign “onboard new CTE Incentive Grants staff” as a duty.
- Consider including:
  - List of tasks, priorities, and assignments.
  - Contacts list, responsibilities.
  - List of certifications that district offers.
  - Recurring calendar, general timeline of program cycle (June to June) and district’s timeline (gathering documentation, submitting claims, etc.).
  - Links to local, DPI and DWD CTE Incentive Grants resources.



# Succession Planning

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**Plan for access** during leaves of absence, transitions.

- Easy access to records – especially at the beginning of a school year.
- All program records saved in the designated folders.
- Document local procedures.
- Notify DWD CTE program lead of permanent changes in staff contact information.
- Consider having staff members added to the mass email distribution list.
- Formally embed assigned duties – especially supervisors.

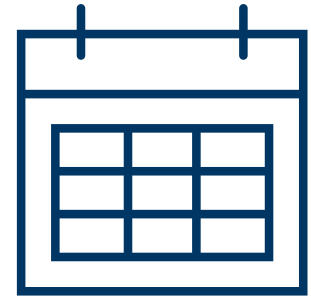


# Electronic Calendars

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Create a CTE Incentive Grants **group calendar**.

- Schedule check-in meetings.
- Meetings for program planning and grant writing.
- Major deadlines.
- Minor deadlines.
- Reminders.



Encourage staff to use electronic calendars.



# Quality Control Checklist



[dwd.wisconsin.gov/det/cte/incentive/default.htm](http://dwd.wisconsin.gov/det/cte/incentive/default.htm)

We've developed a **Quality Control Checklist** that can be adapted to your resources and needs.

This list can help you determine what to put on a calendar, in a policy, in position descriptions, and a checklist. Use it however it works for your district.

Find the list on our **CTE website** in the Training and Resources tab.



# Contact

CTE Incentive Grants Program Lead

[DETCTEGrants@dwd.wisconsin.gov](mailto:DETCTEGrants@dwd.wisconsin.gov)

(608) 733-3887





**DWD CTE website:** [dwd.wisconsin.gov/det/cteincentive/](https://dwd.wisconsin.gov/det/cteincentive/)

- Electronic technical assistance, webinars.
- All annual approved certifications lists.
- Updates, news, changes, notices.



**Department of Public Instruction CTE website:**  
[dpi.wi.gov/cte/technical-incentive](https://dpi.wi.gov/cte/technical-incentive)



**DPI Claims Portal:** [dpi.wi.gov/wisedata/help/request](https://dpi.wi.gov/wisedata/help/request)

- Create a help ticket.





**Thank you** for participating in the CTE Incentive Grant program and supporting your students as they prepare for careers.

