GEAR UP Idaho 2
Guidelines, Policies and Procedures

In this document you will find detailed information on the following guidelines and procedures for the GEAR UP Idaho Program:

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Overview of the Program

In announcing the American Graduation Initiative, The President has set a clear goal for our education system: by 2020, the United States will once again lead the world in the proportion of citizens holding college degrees or other postsecondary credentials. To achieve this goal, the US Department of education has consistently encouraged four key reforms to improve elementary and secondary education—in particular the Department is seeking to: encourage the creation high-quality, college- and career-ready standards and assessments; support State and local efforts to better prepare, support, and distribute effective teachers and school leaders; support the creation of integrated data systems that track progress and foster continuous improvement; and provide intensive support and effective interventions for the lowest performing schools. The Department views the GEAR UP program as a critical component in the effort to improve the quality of secondary schools so that more students are well prepared for college and careers.

The GEAR UP program is a discretionary grant program which encourages applicants to provide support and maintain a commitment to eligible low-income students, including students with disabilities, to assist the students in obtaining a secondary school diploma and preparing for and succeeding in postsecondary education.

Description of the GEAR UP State Grant Program

The GEAR UP program is designed to significantly increase the number of low-income students who are prepared to enter and succeed in postsecondary education. GEAR UP provides six- or seven-year grants to States to provide services at high-poverty middle and high schools and through the first year of college. The services include: providing information regarding financial aid for postsecondary education to participating students in the cohort, encouraging student enrollment in rigorous and challenging curricula and coursework, and improving the number of participating students who obtain a secondary school diploma and complete applications for and enroll in a program of postsecondary education. GEAR UP funding can also be used to provide scholarships to students.

Federal Authorization of the GEAR UP Program

PROGRAM AUTHORIZED. The Secretary is authorized to establish a program that encourages eligible entities to provide support, and maintain a commitment, to eligible low-income students, including students with disabilities, to assist the students in obtaining a secondary school diploma (or its recognized equivalent), and to prepare for and succeed in postsecondary education, by providing—

(1) financial assistance, academic support, additional counseling, mentoring, outreach, and supportive services to students, including students with disabilities, to reduce—
   a. the risk of such students dropping out of school; or
   b. the need for remedial education for such students at the postsecondary level;

(2) information to students and their families about the advantages of obtaining a postsecondary education and, college financing options for the students and their families.
REQUIRED ACTIVITIES. Each eligible entity receiving a grant under this chapter shall provide comprehensive mentoring, outreach, and supportive services participating students. Such activities shall include the following:

1. Providing information regarding financial aid for postsecondary education to participating students in the cohort.
2. Encouraging student enrollment in rigorous and challenging curricula and coursework, in order to reduce the need for remedial coursework at the postsecondary level.
3. Improving the number of participating students who-
   a. obtain a secondary school diploma; and
   b. complete applications for and enroll in a program of postsecondary education.
4. Providing scholarships.

PERMISSIBLE ACTIVITIES FOR STATES. An eligible entity that receives a grant under this chapter may use grant funds to carry out one or more of the following activities:

1. Providing tutors and mentors for eligible students.
2. Providing supportive services to eligible students.
3. Supporting the development or implementation of rigorous academic curricula, which may include college preparatory, Advanced Placement, or International Baccalaureate programs, and providing participating students access to rigorous core academic courses that reflect challenging State academic standards.
4. Supporting dual or concurrent enrollment programs between the secondary school and institution of higher education partners and other activities that support participating students in-
   a. meeting challenging State academic standards;
   b. successfully applying for postsecondary education;
   c. successfully applying for student financial aid; and
   d. developing graduation and career plans.
5. Providing special programs or tutoring in science, technology, engineering, or mathematics.
6. Introducing eligible students to institutions of higher education, through trips and school-based sessions.
7. Providing an intensive extended school day, school year, or summer program that offers-
   a. additional academic classes; or
   b. assistance with college admission applications.
8. Providing other activities designed to ensure secondary school completion and postsecondary education enrollment of at-risk children, such as-
   a. the identification of at-risk children;
   b. after-school and summer tutoring;
   c. assistance to at-risk children in obtaining summer jobs;
   d. academic counseling;
   e. financial literacy and economic literacy education or counseling;
   f. volunteer and parent involvement;
   g. encouraging former or current participants of a program under this chapter to serve as peer counselors;
   h. skills assessments;
i. personal and family counseling, and home visits;

j. staff development; and

k. programs and activities that are specially designed for students who are limited English proficient.

(9) Enabling eligible students to enroll in Advanced Placement or International Baccalaureate courses, or college entrance examination preparation courses.

(10) Providing services to students through the first year of attendance at an institution of higher education.

(11) Fostering and improving parent and family involvement in elementary and secondary education by promoting the advantages of a college education, and emphasizing academic admission requirements and the need to take college preparation courses, through parent engagement and leadership activities.

(12) Disseminating information that promotes the importance of higher education, explains college preparation and admission requirements, and raises awareness of the resources and services provided by the eligible entities to eligible students, their families, and communities.

GEAR UP Idaho Logic Model

The following logic model depicts Idaho program design and its relationship with the goals, objectives, and intended outcomes; this will serve to guide program implementation, evaluation, and improvement.
**Federal GEAR UP Program Guidance**

The implementation of the GEAR UP Idaho program is guided by federal regulations, rules and guidelines in addition to the original grant application. As a participating GEAR UP Idaho school, those working for the program MUST know and abide by these regulations. The following regulations that apply to the GEAR UP program are listed below. Documents can be found at [http://www2.ed.gov/programs/gearup/legislation.html](http://www2.ed.gov/programs/gearup/legislation.html)

**Program Authority:**


**Applicable Regulations:**

The Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 74, 75, 77, 79, 80, 81, 82, 84, 85, 86, 97, 98, and 99.

The regulations for this program in 34 CFR part 694.

The notice of final supplemental priorities and definitions for discretionary grant programs, published in the Federal Register on December 15, 2010 (75 FR 78486). Note: The regulations in 34 CFR part 79 apply to all applicants except federally recognized Indian tribes. The regulations in 34 CFR part 86 apply to institutions of higher education (IHEs) only.

**Cost Principles:**

OMB A-87 – Cost Principles for State, Local and Indian Tribal Governments
**Program Design**

GEAR UP Idaho will provide targeted services based on school and community need. Initial needs assessment will be conducted upon selection of schools to identify target areas that GEAR UP can focus services to affect change.

To define and track implementation of GEAR UP services to schools, each GEAR UP school will complete an annual Program Plan based on required GEAR UP services, but allows for local design based on data and need evaluation. The program plan will provide detailed information on how the district will implement activities and services. All services identified will be measurable, include a plan for how success will be evaluated, and will support GEAR UP national goals and state performance indicators.

Each school will receive funding through a GEAR UP service agreement with the Idaho State Department of Education (SDE). SDE will distribute a yearly agreement that outlines district responsibilities for each GEAR UP school, including adherence to federal law, guidance and cost principles of the GEAR UP program. Funding will be dispersed monthly by reimbursement to the districts for services implemented. SDE will reimburse the School District for the Site Coordinator, GEAR UP services, support, and activities provided in accordance with an approved program plan. The amount of reimbursement requested for a particular billing period must be equal to, or less than, the amount of actual expenditure on approved GEAR UP activities, staff, or services. Reimbursement for employee salary/compensation is limited to compensation for the employee’s time spent on GEAR UP specific activities. Expenses will only be reimbursed once implementation of services has been documented.

**Site Coordinators**

GEAR UP Site Coordinators will be responsible for the implementation of the GEAR UP program at selected GEAR UP schools. Site Coordinators will be part-time or full-time depending on cohort population and additional supports available within the district. The Site Coordinator will be supervised directly by the school district, and the designated GEAR UP Regional Coordinator. The GEAR UP Site Coordinator, in conjunction with GEAR UP site teams will implement direct GEAR UP services in the schools; have daily contact with school staff, cohort students, and their parents; network and collaborate with other programs and resources in the school and community; analyze data for continuous improvement and assurance of best practices, and work toward systemic change within the school and community to develop school reform.

The required educational qualification for the GEAR UP Site Coordinators will include a Bachelor’s degree. Successful candidates must have strong verbal and written communication skills, strong organizational and time management abilities, and must be able to work efficiently and independently without continuous supervision. The ability to build strong working relationships and collaborate among teachers, administrators, students and parents is essential. Data interpretation and understanding of school cultures and systems is preferred.
Recommended Site Coordinator Responsibilities:

1) Provide or facilitate the implementation of required services to GEAR UP students and their parents. These services include all activities outlined in the subaward agreement in support of the intended outcomes of the GEAR UP Idaho program. Examples of services include STEM tutoring programs, college visits, financial aid and college application workshops, implementation of rigorous academic curriculum, etc. In order to ensure these activities and services will be effective, the Site Coordinator is expected to work with others within the school and district to implement, integrate and sustain GEAR UP activities and services.

2) Promote the GEAR UP Idaho mission through active engagement of the school and community. The GEAR UP Site Coordinator will continually work to provide outreach and develop relationships with various community and target populations including: families of GEAR UP students, local civic organizations, local businesses, professional organizations, non-profits and service organizations.

3) Document and report on outcomes of the GEAR UP program to the state. GEAR UP Site Coordinators will attend GEAR UP Site Coordinator meetings and trainings, and provide feedback to school teams. Site Coordinators will be responsible for collecting and compiling service documentation and data necessary for federal reporting of the GEAR UP program. The Site Coordinator will act as liaison for evaluation activities between state GEAR UP staff and school district.

Recognizing that each school is unique, the GEAR UP implementation of services may be the responsibility of the Site Coordinator or they may be assigned to other staff within the school district. However, GEAR UP will not be effective if facilitated by only one person. The site team and all school faculty and staff must actively participate in the program to ensure success and sustainability of GEAR UP.

Schools must be very conscious to ensure GEAR UP funds are supplementing, not supplanting existing positions within the district. If a potential site coordinator already works within the district, GEAR UP responsibilities must be identifiable, documentable and separate from other assigned duties.

GEAR UP Site Coordinators should be assigned full or part-time status based on students served. Recommended guidelines for determining part-time or full-time status:

- 1-150 students (two cohorts): Part-time, specific hours and scheduling to be determined by the school district.
- 151-250 (two cohorts): Part-time or Full-time, specific hours and scheduling to be determined by the school district.
- 251+ students (two cohorts): Full-time, specific hours and scheduling to be determined by the school district.
Due to the vast geographical and socioeconomic range of districts and communities served by the GEAR UP Idaho program, the state will not determine a specific wage for Site Coordinators. However, the recommended range for Site Coordinator wages is $12.00-$17.00/per hour. Benefits are allowable in addition to the salary range.

Site Coordinators will be required to and must be available to travel with prior notification. General travel requirements can be estimated at two state meetings, one national conference and a regional conference annually.

Once a Site Coordinator has been selected, GEAR UP schools must obtain final approval from the GEAR UP Program Director at the State Department of Education before hire.

Site Teams

GEAR UP schools will each develop and manage a local site team to advise development, implementation and systemic integration of the GEAR UP Idaho program at the school level. School level site teams will meet monthly and will be comprised of an administrator, teacher, counselor, community partner, and students and a parent from both the middle and high school that will be served by GEAR UP Idaho.

As a requirement of your subaward agreement, GEAR UP Idaho Site Teams will meet monthly to discuss program implementation and support the site coordinator and staff in program activities and services. Meetings must be documented, and minutes or meeting notes must be submitted with your Monthly Service Reports.

Feedback for Continuous Improvement

GEAR UP Idaho will have many procedures in place to ensure feedback and use of data for continuous improvement. Monthly monitoring of program plans by reviewing documented services and budget alignment will enable Regional Coordinators to ensure that implementation of GEAR UP Idaho services at the school level are on track. In addition to regular program plan and budget monitoring, GEAR UP Regional Coordinators will complete and mid-year and on-site final review with each GEAR UP school. At on-site reviews site coordinators and teams will provide written documentation of progress to meet annual program plan outcomes and objectives.

In addition, Regional Coordinators will verify and document implementation of regular site team meetings, hard copies of student services, budget and match documentation, and take physical inventory of purchases made with GEAR UP funds. Regional Coordinators will utilize data collected at on-site meetings and monthly submissions of data and documents from Site Coordinators to ensure adequate progress toward GEAR UP goals.

Continuous Data Evaluation

GEAR UP goals and objectives will be evaluated on a continuous basis, including the required annual performance and biennial reports. The Program Director will be responsible for tracking student
services implementation and evaluating data elements to ensure GEAR UP Idaho is on track to meet stated performance indicators and objectives. The statewide longitudinal data system will also be used to develop student and teacher level reports to provide information for site coordinators and GEAR UP schools on how to improve practices to address the academic needs of these students. GEAR UP teachers will also be advised to utilize student level data to ensure adequate target services to specific at-risk students. Data available annually or on a less regular basis such as Idaho Standards Achievement Test and ACT EPAS system data will be disseminated to influence practices when available.
Annual Program Plan and Budget

Program Plan

The program plan serves as a planning guide and scope of work for your GEAR UP program. The program plan guides school teams in the design of GEAR UP activities according to GEAR UP Idaho and federal GEAR UP goals and intended outcomes. The program plan then serves as a checkpoint for a mid-year review; the school team can reflect on progress made in executing the program plan and tailor its efforts accordingly. At the end of the year, GEAR UP Idaho will use the program plan to report the extent to which each school achieved its stated plan and outcomes, and use the information to plan for the following year. GEAR UP Idaho will draw best practices and lessons learned from each school’s GEAR UP program plan, reviews, reports and outcomes.

The program plan aligns with GEAR UP Idaho 2’s goals. Each activity should correspond to a certain program measure that GEAR UP Idaho will use in reporting to the U.S. Department of Education as well as in evaluating the effectiveness of the state program.

The intended result of the program plan is a document that includes a comprehensive annual plan linked to GEAR UP Idaho’s goals, each school’s mid-year review and final report, and ultimately US Department of Education’s Annual Performance Report.

Program Plan Instructions

Develop your Program Plan using the GEAR UP Idaho Program Plan Template. Review the goals and objectives of the GEAR UP Idaho program. Decide on how your district will implement required elements of the GEAR UP Idaho program. In addition, include additional activities that address local needs of your GEAR UP students and school based on these goals and the requirements of your subaward agreement.

For each identified activity, create a plan, timeline and budget to implement the activity. Include all required details of the activity specified in the template (target students, activity description, how activity meets the goal, timeline, method of documentation, expected outcome and budget explanation). The activities should be specific and correspond to activities listed in your budget. Remember: GEAR UP funds can only be used for activities that solely benefit GEAR UP students, and only in the current program year. All activities must be measurable and include a plan for how to evaluate success.

For each GEAR UP activity specified in the program plan, proof of implementation must be documented and recorded in Compass. Sufficient documentation of activities may include sign-in sheets, attendance rosters, activity descriptions with signatures, etc. Please keep this documentation and submit with your Monthly Service Reports.

Once completed and approved by the school team, submit the program plan and budget to your Regional Coordinator. Your Regional Coordinator and the GEAR UP Program Manager will review and approve the program plan and budget.
Mid-year Review and Report: In December, your school team will provide an update of the school’s GEAR UP program and outcomes for each planned activity. See Mid-Year Reviews in this document.

Final Review and Report: In May, your school team will provide a final review and report of your school’s GEAR UP program and outcomes. See Final Reviews in this document.

Budget

An integral component of the program plan is the budget. An effective and acceptable budget must have two sections:

- Detailed Budget (including budget totals and match estimate for the year) and breakout of expenses,
- Budget explanation included with each activity

Detailed Budget: In the Detailed Budget Template, please complete a detailed budget based on your program plan. If funds are assigned to any given category in the budget, there must be a corresponding explanation in your program plan. Use the template to create a budget spreadsheet that includes a breakout of how you will use your GEAR UP funds for the included activities. Include the budget category and the activity to which your budget item corresponds. With the exception of salaries and site coordinator travel, ALL budgeted items must correspond with an activity in your program plan.

Budget Explanation: The explanation in the activity description must show a connection between the funds requested and the program plan, as expended funds must be justified by related activities. Funds must ONLY be used toward activities and services to benefit GEAR UP students, parents or teachers who serve the GEAR UP cohorts. A school’s budget explanation must also include a statement affirming that GEAR UP funds will be used to supplement and not supplant funds expended for existing programs.

- Supplement means to enhance or increase funding beyond current educational requirements.
- Supplant refers to replacing required expenses within a program with federal funds. It would be considered supplanting if GEAR UP funds replace an expense that would be incurred even in the absence of federal funds.

All costs associated with the GEAR UP Idaho Program MUST follow all federal guidelines for use of federal funds. Please see your subaward agreement for cost principals applied to the GEAR UP Idaho Program.

GEAR UP Idaho recognizes the importance of providing food as an incentive for student and parent activities. GEAR UP staff recommends working with community business partners to have food donated for events. You may purchase food according to the state guidelines for meal purchases, however at least 50% of the total cost of the meal must be provided by a source other than GEAR UP funds.
GEAR UP funds not expended by the end of the fiscal year will not carry over for the next year. GEAR UP Idaho suggests using all funds available for the year.

**Program Plan and Budget Amendments**

As the GEAR UP program year progresses, a school may find it necessary to revise its original budget in order to achieve the goals in its approved program plan. If a school wishes to expend GEAR UP funds in a manner other than what is outlined in the approved program plan and budget, approval must be sought from your Regional Coordinator by submitting a **GEAR UP Program Plan and Budget Amendment Form**. Amendment requests will be evaluated based on alignment with GEAR UP Idaho goals and objectives, time and effort available for implementation and integration into existing activities and services. Please do not make amendment requests simply to spend funds not expended during the year, as these requests will not be approved.

**Program Plan Evaluation**

A large component of the continuation and success of the GEAR UP program is based on continuous evaluation of activities and services provided by the program. It is essential that Site Coordinators and Site Teams ensure adequate time dedicated to evaluating the effectiveness of services implemented, and use data elements to continually improve the quality of services offered.

Evaluation of each activity listed in the schools program plan will be based on the completion of the activity and its measurable outcomes. Program plan activities will have both an intended outcome that is directly linked to the GEAR UP Idaho goals and objectives as well as a desired student outcome from participation in the activity.

Intended outcomes for each activity should be measureable and directly related to the accomplishment of a specific GEAR UP goal and objective. An intended outcome is measurable when it specifically identifies the target (who or what will be affected), is time-oriented (when it will be accomplished), and indicates direction of desired change.

Desired student outcomes should be measurable and specify the amount of change desired in student knowledge, skills, motivation, awareness, attitude, etc. after participation has occurred.
**Required Activities and Services**

GEAR UP Idaho will provide comprehensive mentoring, outreach, financial aid information and supportive services to GEAR UP schools, families and students. GEAR UP Idaho will ensure equitable access to all students served statewide. GEAR UP Idaho will work to ensure any barriers based on gender, race, national origin, color, disability or age are addressed and accommodated as needed for full participation in the GEAR UP program.

**Services Provided to Schools and Staff**

- Annual needs assessment
- Participation in the Idaho College Access Summit
- Participation in two annual GEAR UP Idaho statewide meetings
- Participation and utilization of the GEAR UP Idaho Professional Learning Community through IDLA
- Implementation of Total Instructional Alignment
- Professional Development of GEAR UP Idaho teachers and staff focusing on four main areas:
  - Rigorous Standards/Common Core
  - Data Usage
  - Comprehensive Counselor Training
  - GEAR UP Training

**Student and Parent Focused Services**

*Ongoing Communication* - Monthly parent and family communication

*ACT* - Implementation of ACT’s College Readiness Program (EXPLORE, PLAN and ACT)

*Student Enrollment in rigorous and challenging coursework* - GEAR UP students will be encouraged to prepare for, enroll and complete college preparatory coursework while in middle and high school including AP programs, tech prep and dual enrollment courses. If rigorous coursework is not available, GEAR UP schools will work to develop and implement rigorous academic curricula and course options at the grade levels served by GEAR UP. Site Coordinators will be expected to work with students individually to ensure students are “on track” for graduation, and provide services to support educational progress for students who are not. Partners in implementation of these services will include Idaho Education Network, Idaho Digital Learning Academy and Idaho postsecondary institutions offering dual enrollment programs. If students are not able to afford advanced coursework options, GEAR UP Idaho will cover the cost through scholarships.

*STEM Tutoring Program* - All GEAR UP schools will implement in-school or after-school tutoring with an emphasis on Science, Technology, Engineering and Math. GEAR UP schools must commit to continuous evaluation of tutoring programs to ensure quality and effectiveness.
Financial Aid and Financial Literacy - Starting in 7th grade, GEAR UP students will participate in no less than three annual lessons or activities based on Financial Aid or Financial Literacy content. GEAR UP site coordinators will also work with local banks to assist GEAR UP students in opening a college savings account. Parent and student activities will also be implemented to ensure that all GEAR UP Idaho students complete a FAFSA.

College Awareness Activities - GEAR UP students will participate in at least one visit to a postsecondary institution per year, starting in 7th grade. GEAR UP schools will make IDLA College 101 available for all students to take during the 11th grade. All GEAR UP students will participate in activities to prepare for the application process and will complete an application to a postsecondary institution in both their junior and senior year.

Career Awareness Activities - Students will create and maintain an Idaho Career Information System portfolio that will include an individualized career plan. GEAR UP students will participate in career exploration and planning activities including skills and strengths assessments and participation in the Dependable Strengths Articulation Process.

Annual Individual Postsecondary Planning Session - To ensure students are on track with an academic program that meets their needs and adequately prepares them to meet postsecondary goals, GEAR UP students will participate in an annual individual secondary and postsecondary planning session. Planning sessions will provide individual intervention to identify at-risk students, ensure students are on track to graduate, and provide guidance in preparation for postsecondary programs including guidance on options for rigorous coursework. As needed based on feedback from individual planning sessions, GEAR UP staff will provide student and parent counseling, advising or supportive programming and services to individual students.

Parent, Family and Community Activities - GEAR UP schools will provide at least two annual parent activities dedicated solely to parent education on college preparation, admissions requirements, importance of rigorous coursework, postsecondary financing and resources. GEAR UP schools will be encouraged to develop a parent task-force to aid in communication with their peers. GEAR UP schools will maintain regular communication (at least monthly – i.e. newsletter, e-mail blast, phone tree) with parents and the community on the importance of higher education, resources and services available to the community and GEAR UP specific activities and services.

Service Learning - Service learning improves the school-community connection and brings relevance to a student’s education and learning experiences. GEAR UP students will participate in at least one service learning activity per year.

9th Grade Transition - GEAR UP Idaho will work with schools to implement targeted best-practices and activities around the 9th grade transition to high school and 12th grade transition to postsecondary programs.
**ACT EPAS**

GEAR UP Idaho will adopt and implement ACT’s College and Career Readiness System, a longitudinal suite of assessments administered in the 8th, 10th, and 11th/12th grades that will help students, families, and educators:

1. identify if a student is on track for being college ready throughout middle and high school,
2. personalize and align interventions and student services to each student’s specific academic strengths and weaknesses, and
3. provide a coherent approach to educational and career planning based on individual student interests, motivations, and aspirations.

At the foundation of the College and Career Readiness System are ACT’s College Readiness Standards, which are precise descriptions of the essential skills and knowledge that students need to become ready for postsecondary education and the world of work, beginning in grade 8 and continuing through grade 12. These standards are validated by actual student academic performance data in K–12, postsecondary education, and workforce training programs. Further, these standards played a central role in the development of the Common Core State Standards Initiative, thereby ensuring that the work of GEAR UP is meaningfully aligned to the Common Core State Standards.

Building from these empirical College Readiness Standards, ACT’s College Readiness Benchmarks represent the level of achievement required for students to have a 50% chance of obtaining a grade of B or higher, or about a 75% chance of obtaining a C or higher, in corresponding credit-bearing first-year college courses (English Composition, College Algebra, introductory social science courses, and Biology). The predicative nature of the benchmarks allows educators to evaluate and respond (personalized interventions) to a student’s progress toward college and career readiness early and often.

Each of the three assessment programs described below assesses students relative to ACT’s College Readiness Standards and reports results along a common score scale, thus allowing educators to seamlessly monitor student progress and growth longitudinally from the 8th through the 12th grade. The assessments include:

**EXPLORE:** Designed to help 8th graders explore a broad range of options for their future, EXPLORE is a curriculum-based educational and career planning program that measures achievement in English, math, reading, and science. As an early indicator of college readiness, EXPLORE gives educators the means to structure middle/high school planning and career exploration for students and their families.

**PLAN:** PLAN helps 10th graders build a solid foundation for future academic and career success. Like EXPLORE, plan is a curriculum-based program, but is designed to help 10th graders build rigorous high school course plans and identify areas of academic need so that they can stay on track for college and work success.
**ACT:** The ACT is designed to assess 11th and 12th graders’ general learning outcomes. Building on EXPLORE and PLAN, the ACT assesses mastery of essential college readiness standards. The ACT is used for admissions and placement at the postsecondary level and is accepted by every institution of higher education in the nation. The ACT also includes a career and educational component designed to help students navigate the next steps in their preparation after high school.

Upon each administration of EXPLORE, PLAN, and the ACT, comprehensive reports will be provided to GEAR UP students and school leaders addressing academic performance, career and educational planning, and other resources designed to help improve educational practice. In addition, the assessment data will play a role in the overall evaluation of the grant by allowing the GEAR UP leadership to evaluate student growth towards college and career readiness, monitor student aspirations, and examine overall performance relative to national and state norms (ACT, Inc., 2007).

**EXPLORE (8th) and PLAN (10th) Testing Procedures**

A testing window will be set for each test, based on a collaborative effort of all GEAR UP schools and accommodation of school calendars. The testing window will be the same for all schools across the state, and must be consistent to ensure validity of data obtained by the test.

GEAR UP Idaho will order EXPLORE and PLAN tests for each school, and tests will be delivered prior to the testing date. GEAR UP Idaho schools will be required to conduct testing according to the guidelines and requirements of ACT, Inc.

Completed tests must be reviewed and validated by a representative from each GEAR UP school, and sent directly to ACT, Inc. for scoring. It is essential that each test is checked for completeness and information accuracy (i.e. name, student ID, etc.). GEAR UP schools will receive school and student level reports approximately six weeks after tests have been returned.

GEAR UP Idaho will be billed directly for completed EXPLORE and PLAN tests.

**ACT (12th) Testing Procedures**

Site Coordinators and Teams will register GEAR UP Idaho students for the ACT through the multiple registration process. Schools will need to request a sufficient amount of registration packets and fee waivers for GEAR UP students registering to take the exam. Students will register via paper and pencil and include the GEAR UP Idaho “school” code in the indicated boxes for reporting. GEAR UP Idaho’s school code is 6779. Students will return their forms to Site Coordinators and all registration forms will be returned to ACT together.

If a student is eligible for a fee waiver, GEAR UP Idaho requests that the fee waiver is used. Otherwise, GEAR UP Idaho will pay for one ACT test in the 12th grade. GEAR UP Idaho will be billed directly for all ACT registrations.
**Goals and Objectives**

**GEAR UP Goal 1**

*To increase the academic performance and preparation for postsecondary education for GEAR UP students:*

GEAR UP Idaho will implement direct services to address goal 1 including providing students scholarships for AP and dual credit coursework, implementing systems to ensure that GEAR UP students are enrolling in rigorous postsecondary preparatory coursework, providing STEM specific academic tutoring, and engaging students in annual individual secondary and postsecondary planning sessions (academic counseling). Interventions will be measured by indicators described in *Exhibit B.*

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**GEAR UP Goal 2**

*To increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students:*

GEAR UP Idaho will implement direct services to address goal 2 including professional development on academic indicators for postsecondary success, support in utilizing data elements to identify students who are “on-track” for graduation and postsecondary entrance, implementation of annual individual postsecondary planning sessions, implementation of transition programs at the 9th and 12th grade and providing a scholarship to all students who participate in the GEAR UP program. Interventions will be measured by indicators described in *Exhibit C.*
GEAR UP Goal 3

To increase students’ and their families’ knowledge of postsecondary education options, preparation and financing:

GEAR UP Idaho will implement direct services to address goal 3 including professional development, research and information dissemination on increasing educational expectations of students and curriculum to inform students and parents on postsecondary options and financing, college and career awareness activities, and monthly student, parent and community communication and education. Interventions will be measured by indicators described in Exhibit D.

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**Exhibit C: GEAR UP Idaho Goal 2 Indicators**

| Indicator 2.1 | Average daily attendance. |
| Indicator 2.2 | % of students on track for graduation at the end of each grade. |
| Indicator 2.3 | % of students promoted on time to the next grade level. |
| Indicator 2.4 | % of students who graduate from high school. |
| Indicator 2.5 | % of students who apply for postsecondary programs. |
| Indicator 2.6 | % of students who enroll in college. |
| Indicator 2.7 | % of students who placed in college-level math and English without the need for remediation. |
| Indicator 2.8 | % of students who are on track to graduate college. |

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**Exhibit D: GEAR UP Idaho Goal 3 Indicators**

| Indicator 3.1 | The percent of students who demonstrate knowledge of available financial aid and the costs and benefits of pursuing postsecondary education defined through FAFSA completion and survey data addressing knowledge of financial aid options. |
| Indicator 3.2 | The percent of parents of GEAR UP students who actively engage in activities associated with assisting students in their academic preparation for college. |
| Indicator 3.3 | The Consortium will measure GEAR UP students’ and families’ self-reported knowledge of postsecondary education options, preparation, and financing through common survey questions in years 02, 04, and 06 of the grant project. |
**Monthly Service Reporting**

Please submit your GEAR UP Service Report monthly. Signed and completed service reports are due by the 10\textsuperscript{th} of the month following the reporting month. Please include ONLY one month on the report. The service report will include the following:

- **An invoice and all receipts related to the listed expenses.** Any time paid must be documented by completion of a staff activity log.
- **Service documentation for all activities listed on the service report.** Sufficient documentation includes sign-in sheets, event agendas, or any additional proof the activity has been implemented. In addition to documentation, all services must be entered into Compass.
- **Monthly meeting minutes or documentation of regular team communication.**
- **All in-kind match forms**

All forms MUST be signed by parties listed in order to be considered complete. All forms submitted without signature will be sent back to be signed prior to processing.
**Invoicing**

*All spending must be in compliance with GEAR UP federal policies and fiscal guidance. Reference to use of GEAR UP federal funds can be found in EDGAR (Education Department General Administration Regulations) and OMB Circular A-87 Cost Principles for State, Local and Indian Tribal Governments.*

**Overview**

School level GEAR UP spending and reporting procedures are at the discretion of each school district. Please use tax-exempt status when applicable. See below for GEAR UP Idaho/SDE monthly reporting requirements.

Invoices must be completed using the **GEAR UP Invoice** and include all related receipts or documentation of expense. Expenses will not be reimbursed without a receipt or proof-of-purchase. Included on your invoice must be all expenses the school district requests in reimbursement for GEAR UP staff, activities and services. The amount of reimbursement requested for a particular billing period must be equal to or less than the amount of actual expenditure on approved GEAR UP activities, staff or services.

*DO NOT* submit purchase orders or account printouts as documentation of purchase. Only receipts listing the actual price incurred will be accepted. Copies are ok. If you are unable to obtain a receipt, please provide documentation of the purchase with a signature verifying that the purchase was made on behalf of the GEAR UP Idaho program.

Include totals from all **GEAR UP In-kind Match Form** in the space provided on the invoice. Submit all signed GEAR UP In-kind Matching forms with your invoice.

**Reimbursement**

Incomplete invoices will not be processed until all necessary documents are received. SDE, in its discretion, may request additional documentation substantiating invoice items as a condition of payment. If SDE requests additional documentation substantiating an invoice item, the item shall be removed from the invoice until SDE approves the item, and SDE shall not be liable for payment prior to approval. Funds expended by the School District in excess of the subaward agreement amount will not be reimbursed.

Monthly service reports and invoices received after the 10th of each month will not be reimbursed until the following month.

The School District must retain a copy of all invoices for its files.
Reimbursement for activities and services will only be made as listed in the districts pre-approved sub-award agreement and Program Plan. Costs associated with activities and services not outlined in the sub-award agreement budget will not be reimbursed by GEAR UP.

Reimbursement for GEAR UP staff salary/compensation is expressly limited to compensation for the employee’s time spent on GEAR UP specific activities. Invoices must document salary expenditures accordingly using the **GEAR UP Staff Activity Log**. A log must be filled out for each person who is paid with GEAR UP funds. All staff logs must be submitted with the invoice.

**GRA (Grant Reimbursement Application)**

Reimbursement to school districts will be made through the State Department of Education’s GRA. Once an invoice is complete, each district’s business manager (or authorized user) must make the request of the amount listed on the invoice for reimbursement. Reimbursement must be requested on or before the 20th of each month. If the amount is not requested, reimbursement cannot be made.

Site Coordinators will need to work with the district’s business manager to determine a monthly routine for invoicing so reimbursement can be made in a timely manner. GRA requests made without accompanying documentation via the GEAR UP Idaho Monthly Service Report and Invoice will not be approved until all documentation is received by the SDE.

**Travel and Food**

GEAR UP Idaho schools will incur travel expenses on behalf of their staff, as it is included in the approved budget. These expenses include registration fees, lodging costs, or costs associated with the use of a school owned vehicle. The invoice must be accompanied by any and all pertinent receipts (lodging, registration, etc.).

The Idaho State Board of Examiners’ Idaho State Travel Policies and Procedures shall apply to any travel expenditures and food purchases, and SDE will reimburse these costs only to the extent allowed under the Idaho State Board of Examiners’ Idaho State Travel Policies and Procedures. These guidelines can be found at: [http://www.sco.idaho.gov/web/sbe/sbeweb.nsf/pages/trvlpolicy.htm](http://www.sco.idaho.gov/web/sbe/sbeweb.nsf/pages/trvlpolicy.htm)

All food purchases must follow the guidelines of the Idaho State Board of Examiners and be accompanied by an event agenda and list of invited attendees to be eligible for reimbursement.
Purchasing Guidelines

Overview

A sound fiscal GEAR UP grant program begins with understanding what types of expenses can be paid for with Federal funds. Allowable costs are those expenses that are specifically permitted (or not prohibited) by the laws, regulations, principles and standards issued by the USDOE and other authoritative sources. Unallowable costs are expenditures that are prohibited to be made using federal dollars, or with dollars that you are claiming towards the GEAR UP match. Often, the federal administrative regulations are extremely clear on what is permitted or prohibited, and in other cases, require a degree of interpretation that is more difficult to attain.

All GEAR UP purchases must be approved in accordance with your GEAR UP Program Plan and relate directly to a GEAR UP activity or service. The first step in determining your allowable costs is to apply a judgment process that ensures that the proposed cost meets a basic USDOE test. In this process, an allowable cost must be:

- necessary to implement the program;
- reasonable, in that a prudent person would determine that the cost is appropriate;
- allocable to the objectives of the program; and
- compliant with the federal administrative regulations that govern the program.

Unfortunately, there is a degree of subjectivity in this process, the rules of which are less hard and fast than most people would want to help guide their budgeting and expenditures. Further complicating the matter is the reality that interpreting the federal administrative regulations is often made difficult by the lack of clarity that the regulations provide, perceived contradictions, and the sheer volume of regulations to decipher.

Work closely with your Regional Coordinator to make determinations about the status of specific expenses as allowable federal costs. Please note that in the event that a cost is unallowable, and it is paid with non-federal dollars (such as school district funds), the SDE will not be able to reimburse for these costs, nor can they be counted as match.

To help you assess whether your program expenses are allowable or not, please review the following list of costs that are commonly incurred in GEAR UP, or are the subject of frequent questions or discussions about their permissibility. These expenditures categories are derived from the cost principles outlined in the OMB Circular A-87.

Please note that just because a cost is interpreted as being allowable under the OMB cost principles, there is no guarantee that you will be able to make that expenditure. Please be sure that the cost relates directly to your program plan and has been approved by your Regional Coordinator.
Non-GEAR UP Purchases – Unallowable

Purchases with GEAR UP Idaho funds must be only for activities and services that benefit the GEAR UP cohort. If districts wish to purchase items, equipment, services, etc for students in addition to the GEAR UP cohort, or to be for entire school use, districts must pay the percentage of costs related to the use of students NOT in the GEAR UP cohort.

Incentive and Reward Purchases – Allowable, with exceptions

GEAR UP Idaho recognizes the importance of offering incentives and rewards for student and parent participation in the program. Incentives will be allowed, but should be kept to a minimum. Incentive totals must be indicated in your approved program plan and budget and relate directly to a specific GEAR UP activity or service.

Food Purchases – Generally unallowable, with exceptions

GEAR UP Idaho will always reimburse for student meal costs associated with College Visits. The 50% donation requirement is not applicable to these visits.

GEAR UP Idaho also recognizes the importance of providing food as an incentive for student and parent activities. Generally food and refreshments are not allowable direct costs, unless they are provided in conjunction with allowable meetings and conferences, whose primary purpose is the dissemination of technical information. In this case, you may purchase food according to the Idaho state guidelines for meal purchases for meetings. However, it is GEAR UP policy that all food purchases require that at least 50% of the meals/refreshments must be provided by a source other than GEAR UP funds. This could be food donations, or funds provided by GEAR UP Idaho partners.

Documentation of attendees and agendas must be submitted with the invoice requesting reimbursement for food. Reimbursement will not be made without this documentation.

Guidelines for food purchases are below:

1. Refreshments
   a. The meeting or training session has a published agenda and attendance is mandatory.
   b. The meeting or training session has an intended duration of three (3) hours or more;
   c. There are five (5) or more attendees; and
   d. The total per attendee cost of the refreshments, per refreshment break, will not exceed $7.50, which is the allowable partial day per diem amount established for breakfasts, pursuant to the chart below.

2. Meals
   a. The meeting or training session has a published agenda and attendance is mandatory;
   b. Location or scheduling conflicts do not lend themselves to a meal recess;
   c. The meeting’s business is furthered by speeches, presentations or interpersonal exchange
that would not normally occur on a daily basis;
d. The meeting or training session has an intended duration of six (6) hours or more;
e. There are five (5) or more attendees; and
f. The per attendee cost of the meal does not exceed the allowable partial day per diem
reimbursement, pursuant to the chart below.

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<table>
<thead>
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<tbody>
<tr>
<td>Breakfast –</td>
<td>$7.50</td>
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<tr>
<td>Lunch –</td>
<td>$10.50</td>
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<tr>
<td>Dinner –</td>
<td>$16.50</td>
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Meetings and Conferences – Allowable

Costs of meetings and conferences, the primary purpose of which is the dissemination
of technical information, are allowable. This includes costs of meals, transportation, rental of facilities,
speakers’ fees, and other items incidental to such meetings or conferences. Be aware of restrictions
pertaining to entertainment costs.

Travel – Allowable

Travel costs are the expenses for transportation, lodging-, subsistence, and related items incurred by
employees who are in travel status on official business of GEAR UP Idaho. Travel costs also may be
incurred in relation to local events for students, parents or professionals participating in programs
authorized by the GEAR UP statute.

Any travel related to the GEAR UP Idaho program should follow the policies and procedures specified
by each school district in addition to the policies and procedures set by the Idaho State Board of
Examiners. State travel guidelines can be found on the Idaho State Board of Examiners web site at
http://www.sco.idaho.gov/web/sbe/sbeweb.nsf/pages/trvlpolicy.htm or on the GEAR UP Idaho web
site at www.gearupidaho.idaho.gov.

Per-diem rates for out of state travel will be reimbursed based on guidelines of the federal
government. Per-diem rates can be found at www.gsa.gov.

GEAR UP will NOT cover the following travel costs: travel or bag insurance, change fees (unless change
is dictated by the GEAR UP Idaho Program Director), agent fees or rental cars (unless prior approval is
obtained).

Student activity costs - Generally unallowable, with exceptions

Costs incurred for intramural activities, student publications, student clubs, and other
student activities, are unallowable, unless specifically provided for in the grant agreement.

Entertainment costs - Unallowable
Costs of entertainment, including amusement, diversion, and social activities and any costs directly associated with such costs (such as tickets to shows or sports events, meals, lodging, rentals, transportation, and gratuities) are unallowable. Be sure to distinguish these unallowable expenses from similarly worded and allowable student activity, meetings and conferences that are approved as part of your program plan.

Supplies – Allowable

Costs incurred for supplies to carry out your program plan are allowable if outlined and approved in the Program Plan. Supplies are items defined as consumable and have a useful life of less than one year. Examples of supplies include paper, printer ink, binders, folders, etc.

Equipment – Allowable

Costs incurred for equipment to carry out your program plan are allowable if outlined and approved in the Program Plan. Equipment is defined as an article of nonexpendable, tangible property having a useful life of more than one year. Examples of equipment include calculators, cameras, laptops, printers, etc.

Curriculum, textbooks, software and other academic support materials will be considered equipment for the purpose of GEAR UP Idaho inventory documentation.

Compensation (Salaries, Wages & Fringe Benefits) – Allowable

Personnel costs such as salaries, wages and fringe benefits are allowable to the extent that the total compensation to individual employees conforms to the established policies of GEAR UP Idaho, is consistently applied, and provided that the charges are for work performed directly on GEAR UP Idaho activities and services. Fringe benefits costs should be in line with state and district policies regarding: annual leave, sick leave, military leave, and employer contributions or expenses for social security, employee insurance, workmen's compensation insurance, tuition or remission of tuition for individual employees.

Communication costs – Allowable

Costs incurred for telephone services, local and long distance telephone calls, telegrams, postage, messenger, electronic or computer transmittal services and the like are allowable. However, you will need to check if these expenses are captured in your indirect costs.

Providing donations and contributions – Unallowable

Contributions or donations (including cash, property, and services) made by the governmental unit or education institution regardless of the recipient, are unallowable federal costs. This should be
distinguished from the match. GEAR UP may receive donations, contributions, or services under the GEAR UP match guidelines.

*Memberships, subscriptions and professional activity costs - Allowable, with exceptions*

Costs associated with memberships in business, technical, and professional organizations are allowable. In addition, subscriptions to business, professional, and technical periodicals are allowable.

*Publications and printing – Allowable*

Publication costs - including the costs of printing, distribution, promotion, mailing, and general handling - are allowable federal costs if they are allocable to project objectives.
In-Kind Match

Documentation

All funds and in-kind services used as match must be accurately documented using the GEAR UP In-Kind Match Form and signed by the person or organization making the donation. Only funds or services directly benefiting GEAR UP students will be counted as match. All matching contributions must be documented and verifiable.

To avoid a potential audit penalty, the kind of funds used as match (school district general funds, private funds, or in-kind match) should be noted in the supporting documentation. Expenditure reports from the school’s accounting system, invoices, time and effort logs, timesheets, and activity sign-in sheets/logs that document the date and activity/purpose are the types of documents that need to be sent with the monthly service report and match forms.

Please include the In-Kind/Match at the bottom of your invoice for each billing period, and submit all related documentation with your monthly service report.

Dollar-for-dollar Match Definition

Section 404(b) of the Higher Education Act requires that at least 50 percent of the total cost of a GEAR UP project is paid with State, local, institutional, or private funds. That is, for each dollar of Federal funds received, at least one dollar of State or non-Federal funds must be contributed. Matching contributions can be in the form of cash or documented in-kind contributions. Contributions are matched “overall” as opposed to category-for-category.

Matching contributions may be made from any non-Federal source, including non-Federal grants. A good question to ask when trying to determine if a specific item or activity qualifies as allowable match is: “Does the GEAR UP program benefit in any way from this activity or expense and how can I document it?”

If a school is located on an Indian Reservation and the school receives federal funds “in lieu of taxes,” those federal funds may be used as matching contributions.

A matching contribution may be counted as cost-sharing towards only one Federal project. If your district has multiple Federal grants, the same contributions cannot be counted as cost-sharing for two or more Federal grants.

If matching contributions benefit both a GEAR UP project and another project or entity, the matching contribution must be credited in the proportion that it benefits the GEAR UP project. For example, if a GEAR UP school hires a tutor to work with both GEAR UP students and students that are not in the GEAR UP program, only the time spent with the GEAR UP students may be counted as match.
Schools that have more than one Federal grant must document match separately for each grant. Matching contributions cannot be shifted from one project to another.

**Valuation of in-kind contributions**

“In-kind” refers to contributions that occur which are valuable to the program but for which NO CASH exchanges hands and no expenditures are recorded in the school’s accounting records. In most cases, in-kind matching contributions are made by third parties for services, supplies, travel expenses, or facility usage for GEAR UP-related activities. All in-kind matching contributions must be supported by documentation that shows how the value of the contribution was derived.

- If the in-kind match relates to volunteer services, a description of the activity as well as type of duties performed, date of the activity, name and signature of the volunteer, and the number of hours worked must be noted. Value of volunteer time is counted as the federally determined volunteer rate for Idaho. This rate changes frequently and can be found at [http://independentsector.org/volunteer_time](http://independentsector.org/volunteer_time). *Teacher time can ONLY be used when time is strictly related to GEAR UP outside the contract day.*
- Volunteer services furnished by professionals, technical personnel, consultants, and other skilled workers may be counted as match if the service is a necessary part of the program. For example, professionals (doctors, lawyers, etc.) volunteering at a career fair or in a job-shadowing program may be matched at their professional salary. Rates for professional volunteer services must be consistent with those paid for similar work in the local labor market.
- Reasonable, allowable, and allocable fringe benefits may be added to the valuation of the match.
- When an employer furnishes the services of an employee, these services shall be valued at that employee’s regular rate of pay.
- Equipment usage is an allowable matching expenditure. The valuation of equipment usage is based on usage hours and fair market value.

**School’s Approved Indirect Cost Rate Used as Match**

An indirect cost (IDC) is a cost incurred for a common or joint purpose benefiting more than one cost objective but not readily assignable to the specific programs benefited. IDCs are pooled and charged by allocation to various programs.

GEAR UP federal requirements state that a GEAR UP grantee may charge as match indirect costs of eight percent (8%) or the school’s negotiated indirect cost rate – whichever is less – of allowable GEAR UP federal funds expended. The grantee must have an approved indirect cost rate agreement in order to use this as qualifying match, and a copy of this approved rate must be included in the match documentation submitted with the school’s final fiscal closeout report.

- Examples: A school spent a total of $18,546 in actual expenditures from its GEARUP grant. The school’s approved indirect cost rate is 12 percent, so it can only use eight percent in this calculation as eight percent is the lesser.
School’s total GEAR UP actual expenditures: $18,546.00 Eight percent indirect cost rate: X 0.08 Allowable indirect match: $ 1,483.68

However, if the school’s approved indirect cost rate is only 2.5 percent, it can only use this 2.5% rate, as it is the lesser.

School’s total GEAR UP actual expenditures: $18,546.00 School’s approved indirect cost rate: X 0.025 Allowable indirect match: $ 463.65

All other services provided by the school must be specifically identified to be used as match. For example, the School Clerk’s time spent preparing GEAR UP mid-year and final fiscal closeout reports could be counted for additional match because the actual time can be identified. In contrast, an Information Technician would probably be part of the indirect costs unless that person specifically worked on computers or software that meets the GEAR UP goals and objectives (i.e., PLATO, IEN, eCIS, etc.).

Facility Usage

Only areas of the school that can be identified as regular/daily use in the GEAR UP program can be captured as match using the annual depreciation expense for the building times the percentage of total square footage occupied – which is the square footage of the room used divided by the total square footage of the building. The depreciation expense can be found in the school’s annual trustee financial summary report. Please identify each area individually showing the details of the calculation and a short description on why it qualifies as match.

- Site Coordinator office space always qualifies as match. The school signed a Partnership Agreement stating that the school will provide office space for the GEAR UP Site Coordinator. Therefore, this space automatically qualifies as match, whether the space is an actual office or the use of a classroom after or between class offerings. The actual size of the room can be used for this calculation, or an eight foot by 12 foot space would be reasonable.
- Areas such as Computer Labs or classrooms can also be counted as match if they are used on a regular basis for GEAR UP activities.
- Once a percentage of space is determined for each area identified as regularly used for GEAR UP activities, that percentage can also be used to capture match for utility costs and custodial costs associated with the space.
- Facility use donated by a third party (College Campuses) is allowed as match and can be based on the fair market rental rate, as long as the third party has signed the in-kind form and a copy of their rates are attached, and otherwise would have charged to use the space.

Bus Usage

The use of a bus and bus driver’s time can be counted as match for travel outside the normal daily school delivery. However, most after-school programs would fall under normal school delivery. There are two ways this rate can be determined, but a school must choose one option and use it consistently over the total grant period. Either:
• **Daily Usage Rate** is a flat rate for the use of a bus. The company that owns the school buses can determine this rate; or a privately-operated bus company can be called to obtain a quote on Chartered Bus Services. If a school uses a flat rate, it can also include the actual gas expenses for the trip; fuel receipts would therefore be required; or

• **Mileage Rate** is a rate that is applied to the total number of miles traveled. This rate takes into account maintenance costs on the bus and the cost to operate the bus, so gasoline costs would not be counted. The company owning and operating a school’s buses would establish this rate.

**Examples and sources of allowable match**

Educational resources and supplies used by the program but paid by non-federal funds or donated by a private party.

Office equipment and specialized equipment for specific activities i.e., sound system, microphones for special assemblies.

Time spent by volunteers on tutoring, mentoring, assisting with program activities, giving motivational speeches that encourage higher academic achievement, or presenting information about college options and financial aid.

Additional professional development activities for teachers and others initiated through GEAR UP but not paid with GEAR UP funds.

Day care services provided for GEAR UP events.

Internships or summer jobs provided to participating students.

Annual licenses or start-up costs for software and/or databases used to capture required student information.

Parental involvement and award activities: Kitchen staff preparation and serving time can be counted as match, as well as janitor time for cleanup. If food for the activity is not being paid with GEAR UP funds, it can be used as match.

Funds raised by clubs and other non-federally funded programs offered in the school which meet the goals and objectives of GEAR UP may be used as match, as can costs associated with supplies, advisor time, etc.
Activity and Service Documentation

For each GEAR UP activity or service implemented at your school you must have documentation or “proof” that the activity or service was implemented. In addition, all GEAR UP activities and services must then be entered into GEAR UP Idaho’s online data collection database, Compass.

Documentation

List each activity or service completed for the month on your Monthly Service Report, attach supporting documentation or proof of implementation with the report. If you have ongoing (daily) activities, list the activity once, with the range of dates implemented in the description.

Supporting documentation may include:

- Sign-in sheets (most common form of documentation)
- Surveys
- Attendance rosters with signature
- Flyers, posters, handouts from the event

Some activities and services may be difficult to document or track. Please work with your Regional Coordinator to identify how these activities can be accurately documented and entered into Compass.

Service documentation is a federal requirement and a requirement of your subaward agreement. This data also relates DIRECTLY to our federal APR due in April that is required to maintain our funding for the remainder of the grant term. Services must be entered monthly, have supporting documentation to ensure accuracy and be submitted with your Monthly Service Report.

Compass

You will utilize an online database to track, document and report on services and activities provided by the GEAR UP program. It is absolutely essential that activities are documented regularly and accurately as our federal funding is dependent on this data.

In Compass the date, time, title of the activity and students served will be documented. This makes it even more essential that sign-in sheets are utilized, so you know what students attended each activity.

Activities that occur regularly (such as daily tutoring) must be entered for EACH day that services are provided. Because of this, it is highly recommended that you keep up on your service documentation and entry weekly, if not daily. Batch entries are NOT recommended for ongoing or daily activities.

You will be assigned a user name and password for access to the online system. Further training will be provided by our external evaluation company, CoBro Consulting.

For questions regarding Compass use, please contact your Regional Coordinator.
**APR Surveys – November 1-December 15**

Surveys will be administered annually by GEAR UP Idaho’s external evaluator CoBro Consulting to fulfill requirements of the US Department of Education for the GEAR UP Idaho program’s Annual Performance Report.

Surveys will be distributed in November and the survey window will close December 15 of each grant year. Surveys must be distributed to GEAR UP Idaho students and parents.

Work with your regional coordinator to determine a successful method for survey distribution and collection. Schools must ensure that all students and parents take and return these surveys annually.
**Mid-Year and Final Reviews**

**Mid-Year Review**

Your mid-year review will be the review of program plan progress, outcomes to date, and budget status. Your Regional Coordinator will compare actual expenditures to those budgeted, and any concerns about over or under spending. Activities and services will be evaluated to ensure progress and on-track implementation of GEAR UP Idaho activities and services.

*To prepare for your Mid-Year Review:* Please prepare a report of your program plan and budget progress through December using the **GEAR UP Idaho Mid-Year Review Form**.

- Describe successes of your program, issues that you struggle with and aspects of the program you like or would like to see changed.
- For each activity, indicate what you have accomplished, what you have not, your current status and expected status for the end of the year review. Use this report to discuss your program, as well as anything else you feel would be beneficial for your Regional Coordinator to know.
- For each activity completed, please include documentation to support that activities have met the intended outcomes identified in the program.
- Review your GEAR UP subaward agreement to ensure you are on-track to complete all required activities by the end of the year.
- Please submit all amendments you would like to make to your budget or plan using the **GEAR UP Idaho Program Plan and Budget Amendment Form**. Not all amendments will be approved. Evaluation will be made based on necessity, and adherence to the original program plan.

**Final Review**

Your final review will be the review of program plan completion, activity and service outcomes, and budget completion. Your Regional Coordinator will compare actual expenditures to those budgeted, and any concerns about over or under spending. Activities and services will be evaluated for successful completion. Your entire site team must be present at your final review. Final reviews will be conducted on-site.

*For your Final Review:* Please prepare a report of your GEAR UP program and budget over the school year using the **GEAR UP Idaho Final Review Form**.

- Describe successes of your program, issues that you struggle with and aspects of the program you like or would like to see changed.
- For each activity, indicate outcomes accomplished based on stated outcomes in your program plan.
- Use this report to discuss your program, as well as anything else you feel would be beneficial for your Regional Coordinator to know.
- Review your GEAR UP subaward agreement to ensure you have completed all required activities.
- Please prepare and submit an inventory of all equipment (nonexpendable, tangible property having a useful life of more than one year) purchased with GEAR UP funds for school use. This will include computers, software, textbooks, calculators, cameras, etc. Complete and submit inventory on the **GEAR UP Idaho Inventory Form**.
- Please prepare to submit your new **GEAR UP Program Plan and Budget** for the next school year. New subaward agreements will be sent to each school district with the approval of the new plan.
**Meetings, Reviews and Reports**

**GEAR UP Idaho Service Reports – Monthly/Ongoing**

GEAR UP Idaho service reports will be submitted by the 10\(^{th}\) of each month to your Regional Coordinator. Monthly Service Reports will include activities and services with appropriate documentation, invoices and all related receipts, in-kind match forms and monthly meeting minutes. See GEAR UP Service Reporting procedure for more information on items to be included in the service report.

**GEAR UP Idaho Site Team Meetings – Monthly/Ongoing**

As a requirement of your subaward agreement, GEAR UP Idaho Site Teams will meet monthly to discuss program implementation and support the site coordinator and staff in program activities and services. Meetings must be documented, and minutes or meeting notes must be submitted with your Monthly Service Reports.

**GEAR UP Fall State Meeting – September**

GEAR UP Idaho will hold an annual fall state meeting each year at various locations in Idaho. The purpose of the meetings will be to provide training, technical assistance and support to all site coordinators. These meetings will also provide site coordinators with an opportunity to network and share best practices regarding the GEAR UP Idaho program.

**APR Surveys – November 1-December 15**

Surveys will be administered annually by GEAR UP Idaho’s external evaluator CoBro Consulting to fulfill requirements of the US Department of Education for the GEAR UP Idaho program’s Annual Performance Report.

**Mid-Year Review - November/December**

The mid-year review will occur before December 31 of each year. Develop your Mid-Year Review report using the Mid-Year Review Report Template. Your entire site team must be present at your mid-year review. Mid-year reviews will be conducted either on-site or via the Idaho Education Network.

**GEAR UP National Capacity Building Conference – February**

The USDOE and NCCEP hold an annual capacity building conference in February for all GEAR UP programs across the nation. Each year, GEAR UP Idaho will select three representatives from GEAR UP Idaho schools to attend the conference.

**GEAR UP Spring State Meeting – April**

GEAR UP Idaho will hold an annual spring state meeting each year in Boise. The purpose of the meeting will be to provide training, technical assistance and support to all site coordinators. These meetings will also provide
site coordinators with an opportunity to network and share best practices regarding the GEAR UP Idaho program.

**New Program Plan - May/June**

You will begin to prepare your new program plan for the following school year in early spring using the **GEAR UP Idaho Program Plan Template**. Please review the program plan and budget instructions and follow the template to complete your plan. If you choose to include activities from the previous year, you must specify what changes or additions you will make to your activity. Your new program plan will be submitted at your final review and report, and must be approved before your subaward agreement the following year will be released.

**Final Review and Report - May/June**

As stated in the contract, a final fiscal and program review will be conducted in May/June. Develop your Final Review Report using the **Final Review Report Form**. This will coincide with the submission of your Program Plan for the following school year. The final review will occur before June 30th of each year.

**Fiscal Closeout Report - August**

The final invoice is due 10 days after your contract end date. Please use the **Monthly Service Report** to complete documentation of all expenses and services. At this time the invoice must include ALL remaining expenses for the contract year incurred by the school district since the end of the June billing period. Any approved funds not spent by this billing period will not carry over into the next contract year. Any unpaid items remaining after this deadline will not be reimbursed.
Document Samples

1. Program Plan Template
2. Detailed Budget Template
3. Program Plan and Budget Amendment Form
4. GEAR UP Monthly Service Report
   a. Invoice
   b. Staff Activity Logs
   c. In-Kind Match Forms
5. GEAR UP Idaho Mid-Year Review Template
6. GEAR UP Idaho Final Review Template
GEAR UP Idaho 2 Program Plan

Program Plan Year:

Date:  
Subaward Recipient:

This document is to serve as a planning guide and scope of work for your GEAR UP program. The program plan guides school teams in the design of GEAR UP activities according to GEAR UP Idaho and federal GEAR UP goals and intended outcomes. The program plan then serves as a checkpoint for a mid-year review; the school team can reflect on progress made in executing the program plan and tailor its efforts accordingly. At the end of the year, GEAR UP Idaho will use the program plan to report the extent to which each school achieved its stated plan and outcomes, and use the information to plan for the following year. GEAR UP Idaho will draw best practices and lessons learned from each school’s GEAR UP program plan, reviews, reports and outcomes.

The program plan aligns with GEAR UP Idaho 2’s goals. Each activity should correspond to a certain program measure that GEAR UP Idaho will use in reporting to the U.S. Department of Education as well as in evaluating the effectiveness of the state program.

The intended result of the program plan is a document that includes a comprehensive annual plan linked to GEAR UP Idaho’s goals, each school’s mid-year review and final report, and ultimately US Department of Education’s Annual Performance Report.

Please complete the program plan and submit to your Regional Coordinator. By signing this form, you agree that the information provided is accurate and complete.

GEAR UP Site Coordinator ___________________________________________ Date ________

Administrator __________________________________________________________ Date ________

GEAR UP Regional Coordinator ___________________________________________ Date ________

GEAR UP Program Manager ____________________________________________ Date ________
Activities and Services

Complete the items below for each GEAR UP activity or service that will be provided to your GEAR UP Idaho students, families and staff. Number each activity and provide a complete explanation including budget detail for each activity.

Student Enrollment in Rigorous or Challenging Coursework
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
Desired Participant Outcome:
Budget Explanation:

Science, Technology, Engineering and Mathematics (STEM) Tutoring
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
Desired Participant Outcome:
Budget Explanation:

Financial Aid/Financial Literacy
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
Desired Participant Outcome:
Budget Explanation:
**College Awareness**
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
 Desired Participant Outcome:
Budget Explanation:

**Career Awareness**
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
 Desired Participant Outcome:
Budget Explanation:

**Individual Secondary & Postsecondary Planning Session**
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
 Desired Participant Outcome:
Budget Explanation:

**Parent Activities**
Activity Title:
Activity Number:
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:  
Desired Participant Outcome:  
Budget Explanation:

Parent and Community Communication  
Activity Title:  
Activity Number:  
Activity Description/Logistics:  
GEAR UP Idaho Indicators:  
Timeline for Implementation:  
Method of Documentation:  
Intended Outcome:  
Method of Measurement:  
 Desired Participant Outcome:  
Budget Explanation:

Service Learning  
Activity Title:  
Activity Number:  
Activity Description/Logistics:  
GEAR UP Idaho Indicators:  
Timeline for Implementation:  
Method of Documentation:  
Intended Outcome:  
Method of Measurement:  
Desired Participant Outcome:  
Budget Explanation:

Teacher Professional Development - Total Instructional Alignment (TIA)  
Activity Title:  
Activity Number:  
Activity Description/Logistics:  
GEAR UP Idaho Indicators:  
Timeline for Implementation:  
Method of Documentation:  
Intended Outcome:  
Method of Measurement:  
Desired Participant Outcome:  
Budget Explanation:

Teacher Professional Development – Data Usage/GEAR UP/Comprehensive Counselor Training  
Activity Title:  
Activity Number:  
Activity Description/Logistics:
GEAR UP Idaho Indicators:
Timeline for Implementation:
Method of Documentation:
Intended Outcome:
Method of Measurement:
Desired Participant Outcome:
Budget Explanation:

**Budget**

Please use the *Detailed Budget Excel Form* to complete and provide a detailed Budget (including budget totals and match estimate for the year) and breakout of expenses.
GEAR UP Idaho 2 - Detailed Budget

Please complete a detailed budget based on your program plan. If funds are assigned to any given category in the budget, there must be a corresponding explanation in your program plan. Include the activity to which your budget item corresponds. With the exception of site coordinator salaries and travel, ALL budgeted items must correspond with an

GEAR UP School:
Budget Year:

<table>
<thead>
<tr>
<th>Admin Costs</th>
<th>Breakout</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>(postage, paper, printer, etc)</td>
<td>0</td>
</tr>
<tr>
<td>Misc Expenses, Supplies ONLY</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Salaries</td>
<td>Site Coordinator 20 hrs/wk x 38 weeks</td>
<td>0</td>
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<tr>
<td>Benefits</td>
<td>Total salary x 0.0856</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>Per Diem 2 days @ $33, Lodging 2 days @ $100, Milage 67 miles @ 0.445</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>GEAR UP Fall Meeting Per Diem, Lodging Milage</td>
<td>0</td>
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<tr>
<td></td>
<td>GEAR UP Spring Meeting</td>
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Total Admin                                                                 0

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<thead>
<tr>
<th>Activity # and Title</th>
<th>Breakout</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity 1 - College Visit</td>
<td>Bus @ $450, Lunches 25@ $2.50</td>
<td>0</td>
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<tr>
<td>Activity 2</td>
<td>0</td>
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<td>Activity 4</td>
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<td>Activity 15</td>
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<td>Activity 18</td>
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<td>Activity 19</td>
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<tr>
<td>Activity 20</td>
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</tbody>
</table>

Total Activities                                                               0

Total GEAR UP 2011-2012 Budget (Admin + Activities)                            0
Total GEAR UP 2011-2012 Match Budget                                            0
GEAR UP Idaho 2
Program Plan and Budget Amendment

Date: 
School: 
District: 
Site Coordinator: 

Activity Amended:

New Activity Description: Please complete all sections related to the change.

Activity Number: 
Activity Title: 
Target Students (Grade Level): 
Activity Description: 
GEAR UP Idaho Indicators: 
Timeline for Implementation: 
Method of Documentation: 
Intended Outcome: 
Method of Measurement: 
Desired Participant Outcome: 
Budget Explanation: 

Please identify what has changed, and why you are requesting the change:

Please indicate any budget changes that do not correspond with a specific activity:

Site Coordinator Signature: ____________________________ Date: ______
District Signature: ____________________________ Date: ______
Regional Coordinator Signature: ____________________________ Date: ______
Program Manager Signature: ____________________________ Date: ______
GEAR UP Idaho 2 - *Monthly Service Report*

Please complete a monthly service report to document GEAR UP services provided. A complete service report must include the following forms and documentation:

- An invoice and all receipts related to the listed expenses. Any time paid must be documented by completion of a staff activity log.
- Service documentation for all activities listed on the service report. Sufficient documentation includes sign-in sheets, event agendas, or any additional proof the activity has been implemented. In addition to documentation, all services must be entered into Compass.
- Monthly meeting minutes or documentation of regular team communication.
- All in-kind match forms.

Please include all forms and additional documentation and submit electronically to your regional coordinator no later than the 10th of each month of the subaward performance period. Please indicate that services have been entered into Compass and sufficient documentation is included for each service listed. Reports without all accompanying documentation will NOT be accepted.

Date: __________________________

GEAR UP School: __________________________

Site Coordinator: __________________________

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity #</th>
<th>Activity Description/Outcomes</th>
<th>Compass</th>
<th>SD Attached</th>
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</thead>
<tbody>
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Site Coordinator Signature: __________________________

Date: __________________________
GEAR UP Idaho 2 - Invoice

Complete, sign and submit this invoice with the GEAR UP Monthly Service Report.

1. The amount requested for a particular billing period must be equal to or less than the amount of actual expenditure on an approved GEAR UP activity, service or staff.
2. All items listed on the invoice MUST be accompanied by receipts or proof of expense incurred. All compensation for time must include a Staff Activity Log for the hours requested for reimbursement.
3. The total amount of reimbursement requested must not exceed total budget indicated in the subaward agreement.
4. Funds may not be encumbered past the ending date of the subaward performance period.
5. Invoices and related documentation must be submitted by the 5th of each month.
6. Once the invoice is complete, please request total amount on the GRA. Once all expenses and documentation has been verified, requests will be approved by SDE.

Date:
GEAR UP School:
GEAR UP Site Coordinator:
Financial Contact:

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<thead>
<tr>
<th>Date</th>
<th>Activity#</th>
<th>Catg. #</th>
<th>Expense Description</th>
<th>Total</th>
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Site Coordinator Signature/Date:
Financial Contact Signature/Date:
Regional Coordinator Signature/Date:
GEAR UP Director Signature/Date:

Total to be Reimbursed:
Total Match (documented by attached in-kind match forms):

Budget Categories
1. Salaries, Wages and Benefits
2. Travel
3. Materials and Supplies
4. Scholarship/Tuition Assistance
5. Other

For GU Staff ONLY
Budget
APR
FA
GRA
# GEAR UP Idaho 2 - Staff Activity Log

Please complete and include with your invoice. A log must be completed and signed by each person who is paid with GEAR UP funds. Include totals to be paid by GEAR UP on your invoice.

**Dates:**
**GEAR UP School:**
**Name:**
**Method and Rate of Pay:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity #</th>
<th>Description</th>
<th>Hours</th>
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**Total Hours:**

I hereby certify that 100% of the hours listed above were spent on GEAR UP activities.

**Name (Print):**

**Signature:**

**Date:**
GEAR UP Idaho 2 - In-Kind Match Form

Please submit to: Idaho State Department of Education - GEAR UP Idaho 650 W. State Street PO Box 83720 Boise, ID 83720-0027

1. Please fill out this form for EACH source of in-kind/matching donation.
2. For each item listed, indicate the appropriate budget category.
3. For materials and supplies, please include all proper documentation of value or receipts of purchase.
4. Be sure that the form is signed by the person who donated the item, time or service. This form is not valid without signature.
5. GEAR UP schools, keep all forms for your records and submit to SDE with your monthly invoice.
6. The volunteer rate of pay is $15.43 per hour. Volunteers acting in their professional capacity may use their personal hourly rate of pay to calculate value. To calculate service value, multiply hours by hourly rate

Date(s):
GEAR UP School:
Name of Contributor:
Business or Organization:
Rate (if applicable):

<table>
<thead>
<tr>
<th>Date</th>
<th>In-Kind Contributed (item or service description)</th>
<th>Budget Category</th>
<th>Value</th>
</tr>
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<tbody>
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</table>

Total Match:

By signing this form, I hereby certify that the contribution above has not and will not be paid from federal funds and this contribution has not and will not be used as match for any other federally funded program. All contributions above were contributed in exclusive and direct benefit of the GEAR UP Idaho program.

Name (Print):

Signature:

Date:
GEAR UP 2 Mid-Year Review

Meeting Date:  
School/District:  
Site Coordinator:  
Meeting Attendees:  

Please prepare a report of your program plan and budget progress through December.

For each activity, include a summary of what you have accomplished, what you have not, your current status, and expected status for the end of the year review. Indicate your progress toward your intended outcome. Use this report to discuss your program, as well as anything else you feel would be beneficial for your Regional Coordinator to know. If you have not yet completed an activity, indicate that in the activity number/title description and move on to the next activity.

Please prepare and attach a budget update to include budget items expended and those that still remain. An updated version of your program plan budget breakout is preferred.

Review the GEAR UP your GEAR UP subaward agreement to ensure that you are on track to complete all requirements.

Regional Coordinator Use Only

___ Mid-Year Review Report Complete ______ Monthly Service Reports Current  
___ Updated Budget ______ Compass Current  
___ Review of Subaward Requirements ______ Other:  

Notes/Follow-Up:

Site Coordinator Signature: ___________________________ Date: ____________

District Signature: __________________________________________ Date: ____________

Reg. Coordinator Signature: ___________________________ Date: ____________

Program Manager Signature: ___________________________ Date: ____________
**Activity Report**

**Activity 1**

Activity Title:
Target Students (Grade Level):
Completion Date:
Intended Outcome:
   - Actual Outcome Met:
Desired Participant Outcome:
   - Actual Participant Outcome Met:
Method of Documentation:
Budget Expended:

Other Comments/Concerns:

*Regional Coordinator Comments/Concerns:*

**Activity 2**

Activity Title:
Target Students (Grade Level):
Completion Date:
Intended Outcome:
   - Actual Outcome Met:
Desired Participant Outcome:
   - Actual Participant Outcome Met:
Method of Documentation:
Budget Expended:

Other Comments/Concerns:

*Regional Coordinator Comments/Concerns:*

**Activity 3 - Title (To be completed _____)**
GEAR UP 2 Final Review

Meeting Date:  
School/District:  
Site Coordinator:  
Meeting Attendees:  

Please prepare a report of your program plan and budget progress through the end of the year.

For each activity, include a summary of what you have accomplished. Indicate your progress toward your intended outcome. Use this report to discuss your program, as well as anything else you feel would be beneficial for your Regional Coordinator to know.

Please prepare and attach a budget update to include budget items expended and those that still remain. An updated version of your program plan budget breakout is preferred.

Please prepare and attach an inventory of all equipment purchased with GEAR UP Idaho funds.

Regional Coordinator Use Only

___ Final Review Report Complete  ___ SC Last Day:  
___ Completed Subaward Requirements  ___ SC Return Day:  
___ Monthly Service Reports Current  ___ Summer Contact:  
___ Updated Budget/Final Invoice  
___ Inventory  
___ Compass Current  
___ New Plan Submitted

Notes/Follow-Up:

Site Coordinator Signature: ___________________________ Date: ____________

District Signature: ___________________________ Date: ____________

Reg. Coordinator Signature: ___________________________ Date: ____________

Program Manager Signature: ___________________________ Date: ____________

GEAR UP 2 Final Review Template
Activity Report

Activity 1

Activity Title:
Target Students (Grade Level):
Completion Date:
Intended Outcome:
   Actual Outcome Met:
Desired Participant Outcome:
   Actual Participant Outcome Met:
Method of Documentation:
Budget Expended:

Other Comments/Concerns:

Regional Coordinator Comments/Concerns:

Activity 2

Activity Title:
Target Students (Grade Level):
Completion Date:
Intended Outcome:
   Actual Outcome Met:
Desired Participant Outcome:
   Actual Participant Outcome Met:
Method of Documentation:
Budget Expended:

Other Comments/Concerns:

Regional Coordinator Comments/Concerns: