EDUCATION

and training beyond high school

GEAR**UP**
WEST VIRGINIA

Proactive Planning:
Best Practices on Managing Your Workplan

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Goals of our Discussion

- To help program staff define challenges in workplan management

- Discuss different strategies for improving workplan development

- Discuss strategies for monitoring and reporting workplan progress

- Discuss aligning the planning, development, tracking and reporting activities for all program staff

The Presenters

WV Higher Education Policy Commission (HEPC)

- Coordinating body for higher education in WV
- Division of Student Success and P-20 Initiatives administers GEAR UP
- Plans, coordinates, and monitors all GEAR UP services for students in 10 counties

Xcalibur, Inc.

- Developer of SCRIBE for GEAR UP – Longitudinal Student Tracking Product

West Virginia GEAR UP

- Six-year state grant
- Will serve more than 13,000 students from 2008-2014
- 10 counties, more than 5,000 students per year
- 2014 cohort and 11th and 12th graders each year of the grant
- 14 High Schools
- 26 Site Coordinators, 3 Regional Coordinators

West Virginia GEAR UP
Service Areas and Schools
Fall 2009 school year

SOUTHWESTERN REGION - *served by Southern West Virginia Community and Technical College*

BOONE: Madison Middle; Sherman Junior High; Sherman High

LINCOLN: Duval P-8; Hamlin P-8; Harts Interm 4-8; Guyan Valley Middle; Lincoln County High

MINGO: Kermit Area K-8; Lenore K-8; Matewan Middle; Williamson Middle; Burch Middle; Burch High; Gilbert Middle; Gilbert High; Matewan High; Tug Valley High; Williamson High

SOUTHERN REGION - *served by Concord University*

MCDOWELL: Southside K-8; Sandy River Middle; Mount View Middle; Mount View High; Big Creek High; Iaeger High

SUMMERS: Summers Middle; Summers High

WYOMING: Baileysville Middle; Glen Fork Middle; Herndon Consol.; Huff Consol.; Mullens Middle; Pineville Middle; Oceana Middle; Road Branch Middle; Westside High; Wyoming County East High
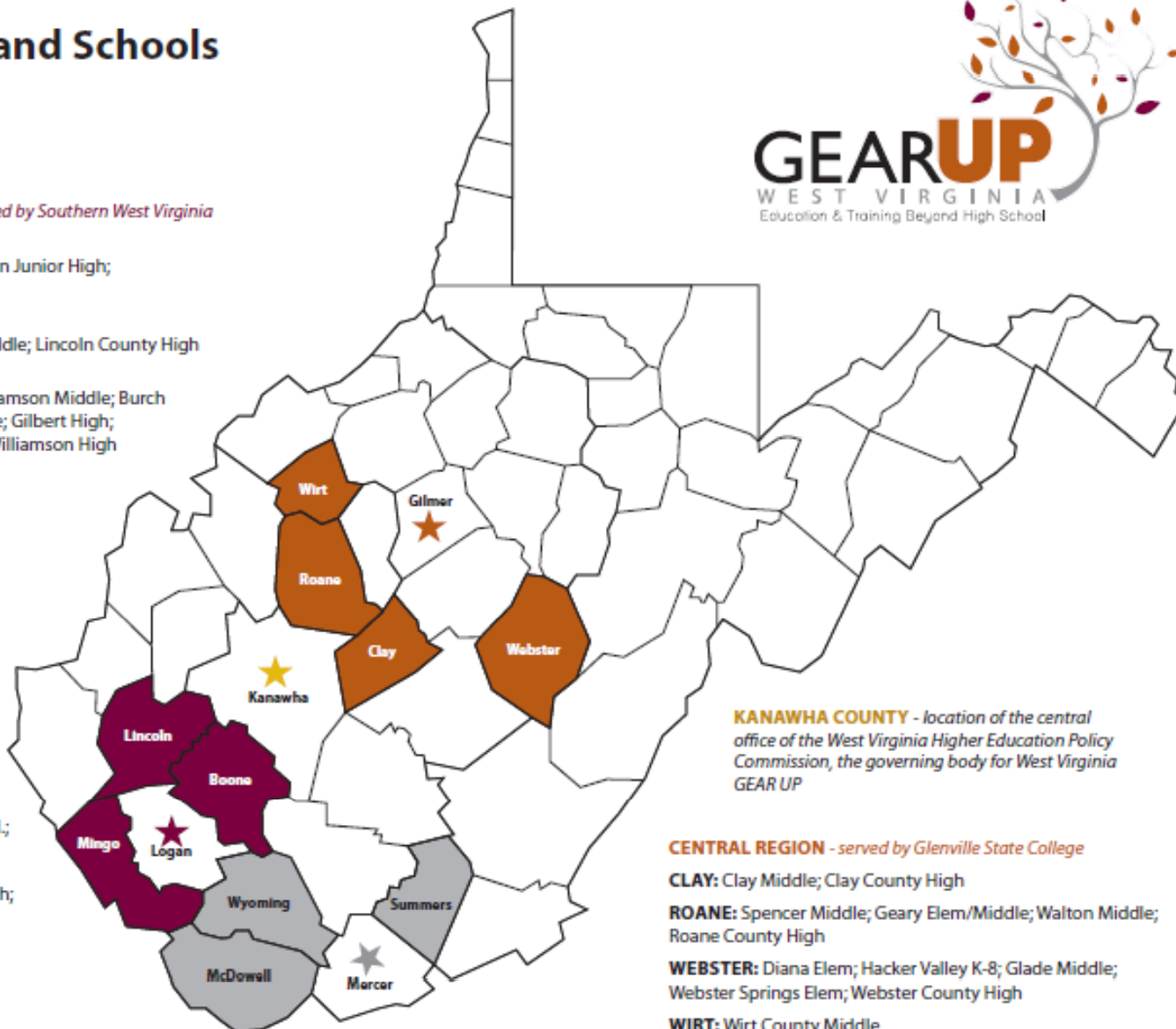
KANAWHA COUNTY - *location of the central office of the West Virginia Higher Education Policy Commission, the governing body for West Virginia GEAR UP*

CENTRAL REGION - *served by Glenville State College*

CLAY: Clay Middle; Clay County High

ROANE: Spencer Middle; Geary Elem/Middle; Walton Middle; Roane County High

WEBSTER: Diana Elem; Hacker Valley K-8; Glade Middle; Webster Springs Elem; Webster County High

WIRT: Wirt County Middle

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Definition of the Workplan

- How do you define the Workplan?

  – Living document

  – Follows grant proposal

  – Rigorous and flexible

Challenges with Workplans

- Share with us challenges you experience with…

  - Developing a workplan

  - Managing a workplan

  - Monitoring a workplan

  - Reporting on the workplan

Setting up your Workplan

- Where to start
  - From your grant proposal
  - Review of activities from last year
  - Feedback from surveys
  - History/Experience
  - Information received at Annual Conference and Capacity Building Workshops

Choosing Activities

- Review funding for the year
- Make sure activities meet this year's goals and objectives
- Link activities to specific and overall objectives
- Supplement versus supplant
- Approval from Federal Program Officer
- Determine/set expectations
  - Hours
  - # of services to deliver
  - Objectives/goals to be met

County and School (LEA's) Mandatory Workplan for FY 2013
Matrix Reflects Minimum Level of Activities for FY 2013   *Note: Additional activities may occur as your budget will allow including busing students to the 2013 Governor's Honors Symposium
(Anticipated Federal Expenditures Categorized by Food, Materials and Supplies)

Minimum Site Coordinator Grant Activities (Per School)	11th	12th	Materials and Supplies	COMPLETION DEADLINE _Event Must be Completed By:_	Comments and Clarifications
Substitute Teachers (Salaries and Fringes)	X	X			Funds to pay substitute teachers when site coordinators attend WV GEAR UP meetings, also may pay for substitutes so that chaperones can attend bus trips, for Mentors to attend trainings/meetings, or possible other GU events.
Travel Expenses	X	X			Funds to pay county staff and site coordinators to attend WV GEAR events and professional development travel. GEAR UP does not reimburse students or parents/guardians.
One Welcome Back to GEAR UP Family Event (Fall 2012 - see completion deadline)	X	X	X	**September 14, 2012**	Event must overview Year 5 of WV GEAR UP planned activities.
Three Parent/Guardian/Family Events (see completion deadlines)	X	X	X	**One by October 30, 2012; One by January 18, 2013; and One by March 7, 2013. Highly recommend completing two in Fall due to possible bad weather in winter.**	Event examples include: Get a Life Program, how to help your student study, financial aid awareness, admission standards, utilizing CFWV.com (as a family), etc. NOTE: ONE event must focus on financial aid and college planning event for the 11th and 12 grade parents.
Two SEPARATE In-State College Bus Tours (Fall 2012/Spring 2013 - see completion deadline) (One for 11th and one for 12th)	X	X	X	**One by December 14, 2012 and One by March 15, 2013**	Event must be associated with an in-class learning activity, career exploration, etc. Event must also include a financial literacy counseling component (For example, an activity on the bus ride teaching students about the true costs of college and how they may finance college). Event may be coordinated in conjuction with other event such as job-site visit or student leadership academy.
Collect federally required GEAR UP surveys from GEAR UP 11th and 12th grade students (minimum of 80% response rate required) and GEAR UP Cohort Parents (minimum of 50% response rate required)	X	X		**February 1, 2013**	Federally required
In conjuction with Central Office: One College Application Week (Fall 2012)	X	X		TBA	Statewide Initiative -- -- Site Coordinator's role is to ORGANIZE week long events at local school and collect and report apprpriate data.
In conjuction with Central Office - **One** College Goal Sunday Event (Feb. 10, 2013). **Site Coordinators are required to work at a site on the day of the event.**		X		**February 10, 2013**	Statewide event -- -- Site Coordinator's role is to promote event and <u>serve as a volunteer on the day of the event</u>
One In-State Job Site Visit (see completion deadline)	X		X	**December 14, 2012**	Event may be combined with the college bus tour for the 11th grade class.
One End of Year Family Event (Spring 2013 - see completion deadline)	X	X	X	**May 28, 2013**	Event should focus on engaging the community and building a college-going culture
Two Student Events of Your Choice that meet GU Goals	X	X	X	**June 7, 2013**	Examples include: CFWV.com account creation, College/Career Fairs, Job Shadowing, Career Counseling, other. Must be associated with an in-class learning activity.
Two Pre-Approved On-site Professional Development Activities for your Educators	X	X	X	**One by December 14, 2012 and One by June 7, 2013**	**ONE on-site PD event must focus on how the School/County/Community will sustain college access and success efforts after GEAR UP funding concludes. A Report must be submitted to Regional Coordinator by agreed-upon date.** Other on-site PD focus preference: (1) Using CFWV.com in the classroom, and (2) Training educators to use technology or tools purchased by GEAR UP as classroom enhancements. Stipends to GU teachers (only) are allowable and must follow county policies.
One Pre-Approved Off-site Professional Development Activity for Educators	X	X	X	**June 7, 2013**	Examples may include: Statewide ACT Conference, Counselor Workshop, Curricular Alignment Worskshop, etc.
In conjunction with Central Office: One Statewide Student Success Summit (Aug. 1-3)	X	X		**August 1-3, 2012**	Site coordinators must bring a school team to the statewide Student Success Summit and coordinate getting their team registered and to the event.
Nine Monthly Meetings with HEROs (Higher Education Readiness Officers) Student Group	X		X	**Monthly** (Sept.'12 - May '13)	Meetings with students who are assisting with GEAR UP activities. ONE activity MUST involve HEROs meeting with students from a local middle school to discuss how students should prepare for High School AND how they should prepare for college.
In-Class and Out-of-Class Events	X	X	X	**Ongoing**	In-class and out-of-class events that promote GEAR UP goals as your budget allows. This may include a guest speaker, career day, college fair, GEAR UP awareness activities, etc.
Equipment/Classroom Enhancements	X	X	X	**Must be in Classrooms by September 1, 2012**	Classroom enhancements is defined as equipment-like items that cost between $1,000 and $4,999 and are itemized in your budget. All classroom enhancements must be inventoried and tagged per WV GEAR UP Policy.
Academic Enrichment Activities (Categories below)			X	**Ongoing**	Approximately 35% of the county budgets are earmarked for academic enrichment activities and these types of activities must occur.
Academic Tutoring	X	X*	X		If tutoring is currently in place for 11th grade, then funding must be used to enhance tutoring. At least 150 contact hours of tutoring per academic semester for the class of 2014 is required. Allowable tutoring expenditures include software in lieu of a person or if plan approved, technology items.
ACT and SAT Preparation	X*	X*	X		Allowable expenditure if ACT preparation activities are not currently in place at the school. This includes: Saturday school, before, during or after school prep for ACT.
Dual Enrollment	X*	X*	X	**Must Begin by September 1, 2012 and Continue Throughout Entire Academic Year**	If dual enrollment is chosen to be offered, then WV GEAR UP will make the payment directly to the WV institution on behalf of the GEAR UP student with emphasis in enrollment in an English composition or math course. The student must complete the course with a "C" or above and must not have dropped out of high school. Must follow _Series 19: Guidelines for the Offering of College Courses for High School Students_ .
Credit Recovery	X*	X*	X		Credit Recovery is a way to "recover" credit for a course that a student was previously unsuccessful in earning academic credit towards graduation. These courses have a primary focus of helping students stay in school and graduate on time. Costs may include software and professional supervision.
Academic Enrichment Contracts	X*	X*	X		

"X" - Indicates the activity is expected to occur in FY 2013
"X *" - Indicates several activity options that are expected to occur in FY 2013. The 11th grade must provide tutoring as an academic enrichment activity, the 12th grade group has several options listed above and may choose up to two.

West Virginia HIGHER EDUCATION Policy Commission   _www._   **wvgearup**._org_

Managing the Workplan

- Training staff
  - 3-step reporting process
  - Activity Description Sheet
  - Data Reporting Calendar
  - Work with your data system
- Coordinating
- Management of staff activities
- Service Summary

3 STEP REPORTING PROCESS

STEP 1: NOTIFICATION ➔

You are *required* to notify West Virginia GEAR UP's central/regional staff two weeks in advance of every GEAR UP sponsored event at your school, outside of tutoring, mentoring and recurring academic enrichment activities. Here's how:

A) Iron out the details of your event. Before you submit your notification, be sure you can report on key logistical aspects of your upcoming activity, such as time, location and presentations planned.

B) Determine whether or not you need to notify central and regional staff. If you are coordinating a recurring event (such as tutoring, mentoring or recurring academic enrichment activities), skip to Step 2 of the Reporting Process. Otherwise, plan to submit one of the following two forms:

OR |
Event Notification Form*- Use this form for any non-recurring student, parent, family or community event.

Professional Development Request Form*- Use this form to obtain approval prior to spending any GEAR UP funds on professional development for educators in your school or region. If you complete at PD Request Form, you do NOT need to submit an Event Notification Form.

C) Submit your notification forms at least **two weeks prior** to your event. If you cannot provide two weeks notice, please discuss the timeline of the activity with your regional coordinator to determine if it is ok to procede.

* Both the Event Notification Form and the Professional Development Request Form are web-based forms to be completed and submitted online.

STEP 2: DATA COLLECTION ➔

The Site Coordinator is responsible for ensuring data is collected about activities that meet GEAR UP goals, even if he or she is not present at the time the activity occurs. Here's how to collect all of the data needed to secure grant funding:

A) Determine which data collection forms will work best for your event, and which ones are required. At a minimum, you are required to document participant attendance. You can provide this documentation by utilizing one of the three available Activity Sign-In Sheets:

OR |
Student & Parent Activity Sign-In *(see pages 3 & 4)* Use this form for any event or activity at which only students, or students + parents/guardians are present.

OR |
Parent Activity Sign-In *(see pages 5 & 6)* - Use this only at events or activities where parents/guardians are present, but students are NOT.

Professional Development Sign-In *(see page 7)* Use this to document participation during Educator Professional Development programs or services.

B) Determine whether or not you need to administer event evaluations. If the event is non-recurring, and appears on the Fiscal Year Work Plan, then you must distribute and collect the **Activity Evaluation forms** *(pages 8 & 9)*. There are two versions of the form, one for students and one for parents or guardians. Note: Although it appears on the workplan and is typically non-recurring, an evaluation is NOT required for PD.

C) Remember, although you are not required to notify central or regional staff members of recurring events (such as tutoring or mentoring), you are required to ensure that data is collected to record these activities. If the three activity sign-in sheets outlined above are not conducive to collecting data for a recurring event or a large assembly, please call the central office and we will develop a custom Sign-In System for your event or activity.

STEP 3: DATA REPORTING ➔

Once event or activity data has been collected, the Site Coordinator is responsible for entering the data into the SCRIBE system and sending hard copies of data to the Regional Coordinators:

A) Data concerning all activities that meet GEAR UP goals must be **entered into SCRIBE within ten business days** of the event activity. Once the data has been entered, the Site Coordinator should print the "Activity Summary Sheet" from **SCRIBE**, sign his or her name and the date of data entry on the bottom of the hard copy of the Activity Sign-In sheet, and staple the documents together along with any event evaluations and supporting documentation (such as a program agenda, promotional materials, or lesson plans).

B) Site Coordinators should then send all entered and completed Activity Packets to their Regional Coordinator by the 15th of the month following the event. For example, all September activity documents are due to the Regional Coordinator by October 15th. These can be mailed (mailing addresses are included on page 3) or passed along when your Regional Coordinator visits your school.

The Regional Coordinators will verify that the data has been accurately entered into **SCRIBE**, and then pass the hard copies along to the central office to be filed. Please note: if activity data is not accurately or completely entered into **SCRIBE**, the Regional Coordinator will ask the Site Coordinator to correct problems or issues.

C) Because **SCRIBE** will generate an "Activity Summary Sheet," the excel file titled "Student, Parent and Educator Activity Summary Sheet" used in Year One of the grant will no longer be required. This file will still be available online, however, as it may be helpful in collecting data from other teachers about events the Site Coordinator does not attend. In entering data into **SCRIBE**, coordinators will be responsible for reporting all the information previously recorded on the old summary sheets. (See also the optional "PD Summary").

West Virginia GEAR UP Activity Description Sheet

Any activity in your school that serves West Virginia GEAR UP students, educators and parents and is related to the GEAR UP goals and objectives, should be recorded even if GEAR UP does not fund the activity.

SCRIBE Service Type Category

<u>STUDENTS</u>

Code: **TUT** *Activity:* **Tutoring** *(Object Code 112)***/Academic Enrichment**
Description: An activity in which a GEAR UP student receives additional, special or remedial instruction or assistance; educational activities that increase and enhance student learning. At least 150 hours of tutoring is recommended per academic semester for the class of 2014.
Examples: Group or individual tutoring, drop-in tutoring, after school tutoring, intervention, study hall, test prep, GEAR UP tutor, lunch tutoring and homework tutoring. Credit Recovery, NEO2's, Cognitive Tutor, EEE, APEX, Catapult, Odyssey, Acuity, Quia, TurningPoint, test prep, CPS, Student Edge, PLATO, READ 180, Writing Roadmap, Virtual Surgery, and other computer lab-based educational tools. Saturday school, before, during or after school prep for SAT, ACT or other college entrance exam tutoring. Any administrative or planning task directly related to the activity in compliance with the workplan.

Code: **RAC** *Activity:* **Rigorous Academic Curricula**
<u>The Regional Coordinators gather this data.</u>

Definition: Educational activities that integrate the knowledge and skills students need for college and workplace readiness.
Examples: Dual Enrollment, certificate programs and Advanced Placement (AP) examinations.

Code: **ME** *Activity:* **Comprehensive Mentoring**
Description: A mentoring program is one in which a caring, adult/peer/college student devotes time to a GEAR UP student in order to help the student achieve his/her potential and discover his/her strengths. A mentoring activity applies only to those activities in which the GEAR UP student is the one being mentored. In general, mentoring implies a longer-term relationship and not a one-time activity.
Examples: HEROs meetings, Boys & Girls Club, College Summit Peer Leader Meetings, school-based mentoring program, GEAR UP mentoring (the Regional Coordinators gather this data), WE CAN mentoring program, Senior Buddy program or any administrative or planning task directly related to the activity in compliance with the workplan.

WV GEAR UP DATA COLLECTION — 2012-2013 YEAR CALENDAR

NOTES: Each month Site Coordinators should create a new service in SCRIBE for reoccurring activities.

Month	Tue	Wed	Thu	Fri	Sat	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri
Month 0								SCM 1	Aug 2	3	6	7	8	9	10	13	14	15	16	17										
Month 1			1st Sem.			20	21	22	23	24	27	28	29	30	31	Sept 3	SCM 4	5	6	7	10	11	12	13	14					
Month 2						DATA 17	18	19	20	21	24	25	26	27	28	Oct 1	2 (College Application Week)	3	4	5	8	9	10	11	12					
Month 3						DATA 15	SCM 16	17	18	19	22	23	24	25	26	29	30	31	Nov 1	2	5	6	7	8	9					
Month 4						12	13	14	DATA 15	16	19 (Student and Parent Surveys)	20	21	22	23	26	SCM 27	28	29	30	Dec 3	4	5	6	7	10	11	12	13	
Month 5				14		DATA 17	18	19	20	21	24	25	26	27	28	31	Jan 1	2	3	4	7	8	9	10	11	14	DATA 15	16 (2nd Sem.)	17	
Month 6				18		21	22	23	24	25	28	29	30	31	Feb 1	4	5	6	7	8	11	12	13	14						
Month 7				DATA 15		18	19	20	21	22	25	SCM 26	27	28	Mar 1	4	5	6	7	8	11	12	13	14						
Month 8				YR5 15	YR6 16	APR 18	19	20	21	22	REV 25	26	27	28	29	Apr 1	2	3 (Spring Break)	4	5	8	9	10	11	12	DATA 15	16	17	18	
Month 9				SCM 19	Higher Ed. Day	22	23	24	25	26	29	30	May 1	2	3	6 (School Personnel Survey)	7	8	9	10	13 (WESTEST Week)	14	DATA 15	16						
Month 10				17		20	21	22	23	24	27	28	29	30	31	Jun 3	4	5	6	7	10	DATA 11	12	13	14					

First and Last Dates

3/16/12 First reporting date of YR 5 APR

8/1/12 First day of SC Contract

3/15/13 Last reporting date of YR 5 APR

3/16/13 First reporting date of YR 6 APR

6/15/13 Last day of SC Contract

Site Coordinator meeting dates are subject to change. Always refer to the WV GEAR UP website for up to date information. www.wvgearup.org

Site Coordinator Meetings

8/1/12 in Morgantown

9/4/12 in Charleston

⭐ 10/16/12 in Charleston

11/27/12 in Charleston

⭐ 1/15/13 in Charleston *Bring YR 5 data and surveys.

⭐ 2/26/13 in Charleston

⭐ 4/19/13 in Charleston *RC bring remaining YR 5 activity backup documents to this meeting.*

⭐ 6/11/13 in Charleston *Bring data.

School Holidays Within Instructional Term

Sept 3: Labor Day   Nov 6: General Election
Nov 12: Veterans Day   Nov 22: Thanksgiving
Dec 25: Christmas Day   Jan 1: New Year's
Jan 21: MLK Jr.   May 27: Memorial Day

LEGEND

Label		Description
DATA	10	Activity backup documentation for the previous month is entered into SCRIBE and is **due** to your Regional Coordinator.
APR	1	All activity backup documentation from 8/1/12 - 3/15/13 is due to your Regional Coordinator for the YR 5 APR on 3/18/13.
YR5	1	Last activity date for YR 5 APR
YR6	1	First activity date for YR 6 APR
REV	1	Final activity backup documentation revisions on YR 5 activities from 8/1/12 - 3/15/13 must be complete by Regional Coordinator on 3/25/13.
SCM	8	Site Coordinator Meeting *Bring your data/activity backup documentation to the meetings indicated with a ⭐
SURVEY	8	Send MJ the # of 10th, 11th, and 12th student and parent paper surveys by **8/31/12**. Paper surveys distributed at **10/16/12** SC meeting. Bring back paper Surveys at **1/15/13** SC meeting. **2/1/13** last day to mail remaining paper surveys and online survey closes. **5/1/13** Online school personnel survey begins. **6/11/13** Focus group with Site Coordinators. **6/14/13** School personnel survey closes.

Follow up – before next year

- Student / Parent survey responses review
- Calendar Review
- Review of the School Personnel Surveys
- Review of the strengths and weaknesses for activities recorded throughout the year

What can work for you?

Key points we want you to leave with

- Disseminate information/processes
- Sharing information
- Communication
- Documentation available for review
- Using tracking system as a tool

Proactive Planning

Contact Information

Copies of this presentation are available at www.wvgearup.org in the Resources section under the Educator Resources tab.

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