# Proactive Planning: Best Practices on Managing Your Workplan



NCCEP/GEAR Annual Conference, Washington, DC

July 20-23, 2014

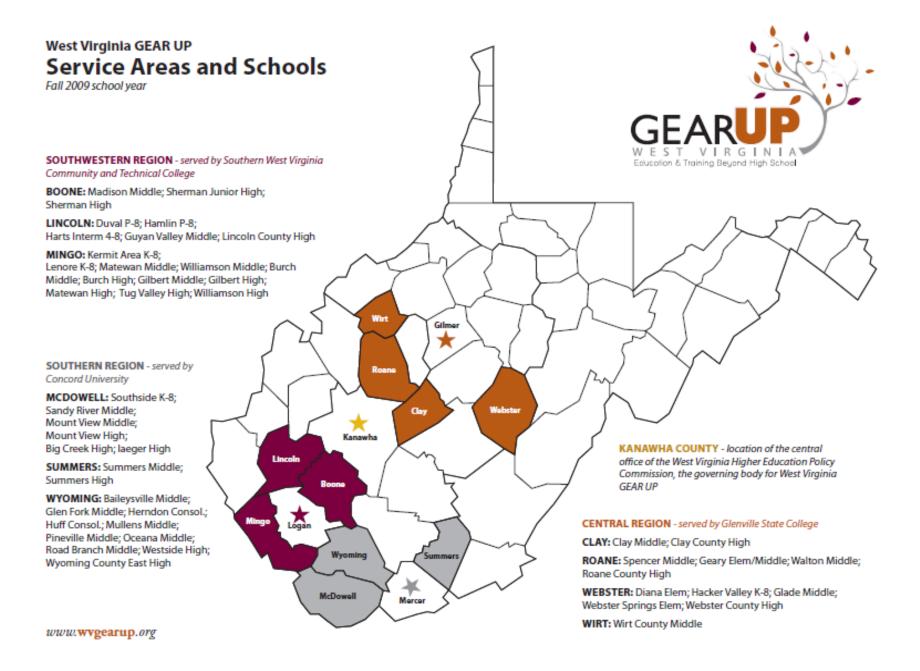
### **The Presenters**

### WV Higher Education Policy Commission

- Coordinating body for higher education in WV
- Division of Student Affairs, who 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

### **WV GEAR UP**

- Six-year state grant with no cost extension
- Will serve more than 15,000 students from 2008-2015
- 10 counties, more than 5,000 students per year
- 2014 cohort and II<sup>th</sup> and I2<sup>th</sup> graders each year of the grant
- 14 High Schools
- 26 Site Coordinators, 3 Regional Coordinators,
   6 Central Office Staff, and an External Evaluator



### **Goals of our Discussion**

- To help program staff define challenges in workplan management
- Discuss aligning the planning, development, tracking and reporting activities for all program staff
- Discuss different strategies for improving workplan development
- Discuss strategies for monitoring and reporting workplan progress

# 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

Matrix Reflects Minimum Level of Activities for FY 2010 \*Note: Additional activities may occur as your budget will allow. Materials and Supplies)

11th

Х

Χ

Х

Χ

Х

Χ

Χ

Χ

Χ

Х

X\*

X\*

12th

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Х

Х

Χ

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Χ

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Х

X\*

Χ\*

Materials

and Supplies

Х

Χ

Χ

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grade parents.

Worskshop, etc.

with an in-class learning activity.

types of activities must occur.

allowable and must follow county policies.

expenditures include software in lieu of a person.

examination who are not eligible for a college board waiver.

Comments and Clarifications

Funds to pay county staff and site coordinators to attend WV GEAR events and professional development

Event may be combined with the college bus tour for the 8th grade class. Examples of cultural events may

Event examples include: Get a Life Program, how to help your student study, financial aid awareness,

admission standards, etc. Manditory financial aid focused and college planning event for the 11th and 12

Examples include: College/Career Fairs, Job Shadowing, Career Counseling, other. Must be associated

In-class and out-of-class events that promote GEAR UP goals as your budget allows. This may include a

Understanding poverty workshop delivered by Regional Coordinator. Stipends to GU teachers (only) are

Classroom enhancements is defined as equipment-like items that cost between \$1,000 to \$4,999 and are

itemized in your budget. All classroom enhancements must be inventoried and tagged per WV GEAR UP

Approximately 35% of the county budgets are earmarked for academic enrichment activities and these

If tutoring is currently in place for 8th grade, then funding must be used to enhance tutoring. Atleast 150

Payment on behalf of an 11th and 12th grade WV GEAR UP student to take an Advance Placement (AP)

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 or ACT prep software purchase.

contact hours of tutoring per academic semester for the class of 2014 is required. Allowable tutoring

Focus preference: (1) Using and understanding EXPLORE results to better student education and (2)

Examples may include: Statewide ACT Conference, Counselor Workshop, Curricular Alignment

Funds to pay site coordinators to attend WV GEAR UP meetings.

Event must overview Year 2 of WV GEAR UP planned activities.

Event must focus on transition from middle school to high school.

guest speaker, career day, college fair, GEAR UP awareness activities, etc.

include a visit to the state capitol, Clay Center, etc.

travel. GEAR UP does not reimburse students or parents/quardians.

Event must be associated with an in-class learning activity, career exploration, etc.

County and School (LEA's) Manditory Workplan for FY 2010

8th

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(Anticipated Federal Expenditure 1	ypes for Food and M
Site Coordinator Grant Activities	Class

Site Coordinator Grant Activities
(Per School)

Substitute Teachers (Salaries and Fringes)

One In-State College Bus Tour (2009 -10)

One Welcome Back to GEAR UP Family

One End of Year Family Event (Spring

One Student Event of Your Choice that

n-Class and Out-of-Class Events

One Pre-Approved Professional

Development On-site Activity for your

Development Activity for Educators

Academic Enrichment Activities

Fall and Spring Semester Tutoring

Advanced Placement Testing

ACT and SAT Preparation

One Pre-Approved Off-site Professional

Equipment/Classroom Enhancements (If in

Travel Expenses

Event (Fall 2009)

meets GU Goals

Educators

school budget)

(Categories below)

2010)

One In-State Cultural Event

One Parent/Guardian Event

County and School (LEA's) Mandatory Workplan for FY 2014 Matrix Reflects Minimum Level of Activities for FY 2014 \*Note: Additional activities may occur as your budget will allow including busing students to the 2014 Governor's Honors Symposium (Anticipated Federal Expenditures)

**COMPLETION** 

**DEADLINE** 

Event Must be

Materials

and

**Supplies** 

11th

Χ

Χ

Χ

Χ

Χ

Χ

Χ

Χ

12th

Substitute Teachers (Salaries and Fringes)	Χ	X			chaperones can attend bus trips, for mentors to attend trainings/meetings, or possible other GU events.
Travel Expenses	Х	Х			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 2013 - see completion deadline)	Х	Х	Х	September 13, 2013	Event must overview Year 6 of WV GEAR UP planned activities.
Three Parent/Guardian/Family Events (see completion deadlines)	Х	Х	Х	One by October 31, 2013; One by January 31, 2014; and One by March 7, 2014. 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, FAFSA workshop, 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 2013/Spring 2014 - see completion deadline) (One for 11th and one for 12th or two combined)	Х	Х	Х	One by December 13, 2013 and One by March 14, 2014	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 conjunction 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, 2014	Federally required
In conjunction with Central Office: One College Application & Exploration Week (Oct. 14-18, 2013)	Х	Х		ТВА	Statewide Initiative Site Coordinator's role is to ORGANIZE week long events at local school and collect and report appropriate data.
In conjunction with Central Office-One College Goal Sunday Event (Feb. 9, 2014). Site Coordinators are required to work at a site on the day of the event.		х		February 9, 2014	Statewide event Site Coordinator's role is to promote event and serve as a volunteer on the day of the event.
One In-State Job Site Visit (see completion deadline) Required for 12th grade, but may take 11th graders if budget permits.	Х	х	Х	December 13, 2013	Event may be combined with the college bus tour for the 11th grade class.
One End of Year Family Event (Spring 2014 - see completion deadline)	Х	Х	Х	April 18, 2014	Event should focus on engaging the community and building a college-going culture
Two Student Events of Your Choice that meet GU GoalsOne must focus on transition from High School to Education and Training after	х	Х	Х	June 6, 2014	Examples include: CFWV.com account creation, College/Career Fairs, Job Shadowing, Career Counseling, other. Must be associated with an in-class learning activity.

are allowable and must follow county policies.

to the event.

Comments and Clarifications

Funds to pay substitute teachers when site coordinators attend WV GEAR UP meetings, also may pay for substitutes so that

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. FY 2013 Sustainability plans should be updated. The updated 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)

Examples may include: Statewide ACT Conference, Counselor Workshop, Curricular Alignment Workshop, etc.

Training educators to use technology or tools purchased by GEAR UP as classroom enhancements. Stipends to GU teachers (only)

Site coordinators must bring a school team to the statewide Student Success Summit and coordinate getting their team registered and

One by December 13, 2013

and One by June 7, 2014

June 7, 2014

August 4-6, 2013

**Minimum** Site Coordinator Grant

**Activities** 

(Per School)

Substitute Teachers (Salaries and Fringes)

Two Pre-Approved On-site Professional

One Pre-Approved Off-site Professional

Student Success Summit (Aug. 4-6, 2013)

In conjunction with Central Office: One Statewide

Development Activity for Educators

Development Activities for your Educators

graduation

# 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



#### 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:

<u>Event Notification Form</u>\* - Use this form for any non-recurring student, parent, family or community event.

OR

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:

**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.

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

OR

OR

**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 <u>SCRIBE system</u> 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

#### **STUDENTS**

#### 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, TumingPoint, 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

The Regional Coordinators gather this data.

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	GE	AR	UP	DAT	DATA COLLECTION 2013-2014 YEAR CALENDAR																							
OTES: Each month Site Coordinators should create a new service in SCRIBE for reoccurring activities.	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday	Wednesday
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Month 2					16	17	18	19	20	23	24	25	26	27	30	Oct 1	2	3	4	5	6	7	sсм 8	9	10	11			
Month 3					c 14	ollege A	pplicati 16	on Wee	k 18	21	22	23	24	25	28	29	30	31	Nov 1	2	3	4	5	6	7	8			
Month 4	1.5				11	12	13	14	15	18	DATA 19				t Surv 25		27	28	29	30	Dec 1	2	3	4	5	6	9	10	11
Month 5	12	13	14	15	16	17	18	19	20	23	24	25	26	27	30	31	Jan 1	2	3	4	5	6	7	8	9	10	13	DATA 14	2 <sup>rd</sup> Sem. 15
Month 6	16	17	18	19	20	21	22	23	24	27	28	29	30	31	Feb 3	4	5	6	7	8	College Goal Sunday	10	11	12	13	DATA 14			
Month 7	10		10		17	18	19	20	Higher Ed Day 21	24	sсм 25	26	27	28	Mar 3	4	5	6	7	8	9	10	11	12	13				
Month 8		14	YR 6 15	FPR 16	17	APR 18	19	20	21	24	REV 25	26	27	28		ring B	A	Apr 3	SCM 4	GHS 5	6	7	8	9	10	11	14	DATA 15	16
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<u>/16/13</u> First report	ina da	ate of	VR 6	ΔPR			3 in S	-						Ē	DATA	SCRIBE and is <b>due</b> to your Regional Coordinator.													
<u>/1/13</u> First day of \$	( T			7 M T X			13 in 9								APR	All activity backup documentation from 8/1/13 - 3/15/14 is due to your Regional Coordinator for the YR 6 APR on 3/18/14.													
/ <u>15/14</u> Last reporti				APR		11/19	9/13 in	S. C	harles	ston				1	YR5	1	Last activity date for YR 6 APR												
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<u>/15/14</u> Last day of	SCC	ontra	ct		2/25/14 in S. Charleston  4/4/14 in Charleston *RC bring remaining YR 6 activity backup documents to this meeting.*										REV	1 0													
Site Coordinator mee						6/10/14 in Charleston *Bring data.									Site Coordinator Meeting *Bring your data/activity backup SCM 8 documentation to the meetings.														
website for up to	o date	informa		JP	Se	School Holidays Within Instructional Term Sept 2: Labor Day Nov 11: Veteran's Day									Send MJ the # of 11th, and 12th student and parent paper surveys by 8/30/13. Paper surveys distributed at 10/8/13 SC meeting. Bring back paper Surveys at 1/14/14 SC meeting. 1/17/14 last day to mail remaining paper surveys and online survey closes. 4/28/14 Online														
						Nov 28: Thanksgiving Dec 25: Christmas Day Jan 1: New Year's Jan 20: MLK Jr. May 13: Gen. Election May 26: Memorial Day										school personnel survey begins. <b>5/30/14</b> School personnel survey closes. <b>6/10/14</b> Focus group with Site Coordinators.													

# 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

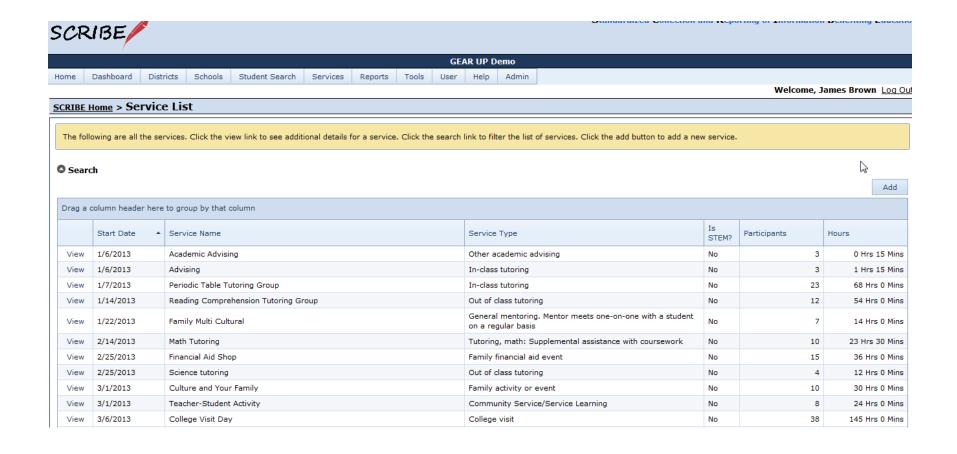
# What can work for you?

Key points we want you to leave with



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

# **Service Tracking**



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