



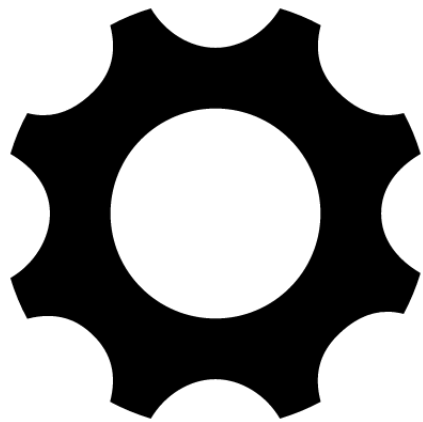
# WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM Implementation for Partner Institutions



PROGRAM IMPLEMENTATION WEBINAR

June 10, 2019





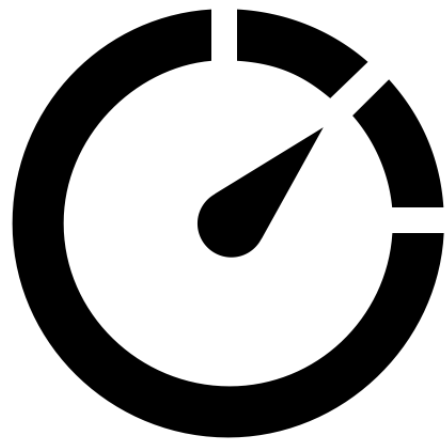
**Acronym:** Gaining Early Awareness and Readiness for Undergraduate Programs

**Structure:** a competitive grant program funded by the U.S. Dept. of Education



WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM  
Implementation for Partner Institutions





**Mission:** to increase the number of low-income students who are prepared to enter and succeed in postsecondary education programs



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**Grant:** \$21 Million 7 Year Federal Grant

**Administrative Oversight:** WV Higher Education Policy Commission

**Students Served:** Approximately 5,000 Students Annually (more than 17,000 over life of the grant)



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**Student Service Model:** Cohort students (class of 2020) and priority students (12<sup>th</sup> graders in eligible schools)

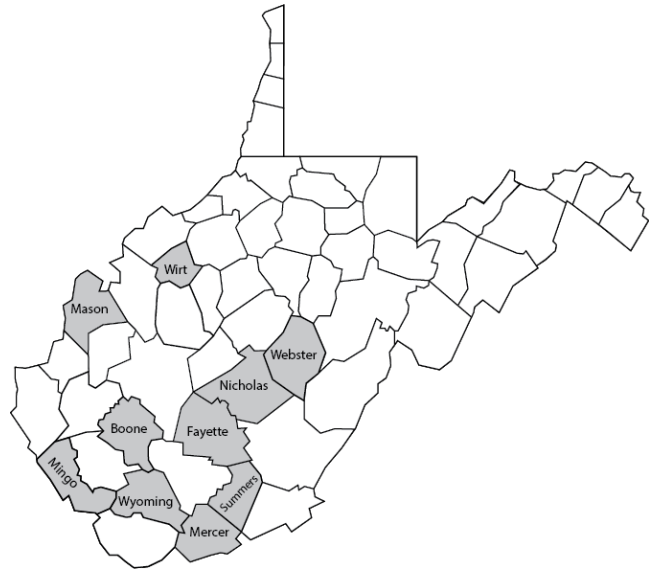
**Service Area:** Select schools in 10 counties

**Staffing Model:** Site Coordinators, County Coordinators and Mentors



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## Service Area

- Boone
- Fayette
- Mason
- Mercer
- Mingo
- Nicholas
- Summers
- Webster
- Wirt
- Wyoming



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**GEAR UP Student Selection Criteria:** we looked at a number of factors to determine county and school eligibility. All Students enrolled in selected schools from both the cohort and priority models are considered WV GEAR UP students.



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## DETERMINING SERVICE AREAS



% of Population in Poverty



Median Family Income



Low SES and Unemployment Rate



% College Going Rates



% Bachelor's Degree or Higher



% Students Enrolled in Dev. Ed. Courses



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## PRIORITY GROUP: HIGH SCHOOL CLASS OF 2019 (Pilot Year)

### **Boone County**

Van Jr./Sr. High School

### **Fayette County**

Meadow Bridge High School

Midland Trail High School

Oak Hill High School

Valley High School

### **Mason County**

Hannan Junior/Senior High School

Point Pleasant Jr./Sr. High School

Wahama Junior/Senior High School

### **Mercer County**

Bluefield High School

Montcalm High School

### **Mingo County**

Mingo Central High School

Tug Valley High School

### **Nicholas County**

Nicholas County High School

Richwood High School

### **Summers County**

Summers County High School

### **Wirt County**

Wirt County High School

### **Webster County**

Webster County High School

### **Wyoming County**

Westside High School



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## COHORT GROUP: HIGH SCHOOL CLASS OF 2020

### **Boone County**

Van Jr./Sr. High School  
Scott High School  
Sherman High School

### **Fayette County**

Meadow Bridge High School  
Midland Trail High School  
Oak Hill High School  
Valley High School

### **Mason County**

Hannan Junior/Senior High School  
Point Pleasant Jr./Sr. High School  
Wahama Junior/Senior High School

### **Mercer County**

Bluefield High School  
Montcalm High School  
PikeView High School  
Princeton Senior High School

### **Mingo County**

Mingo Central High School  
Tug Valley High School

### **Nicholas County**

Nicholas County High School  
Richwood High School

### **Summers County**

Summers County High School

### **Wirt County**

Wirt County High School

### **Webster County**

Webster County High School

### **Wyoming County**

Westside High School  
Wyoming East High School

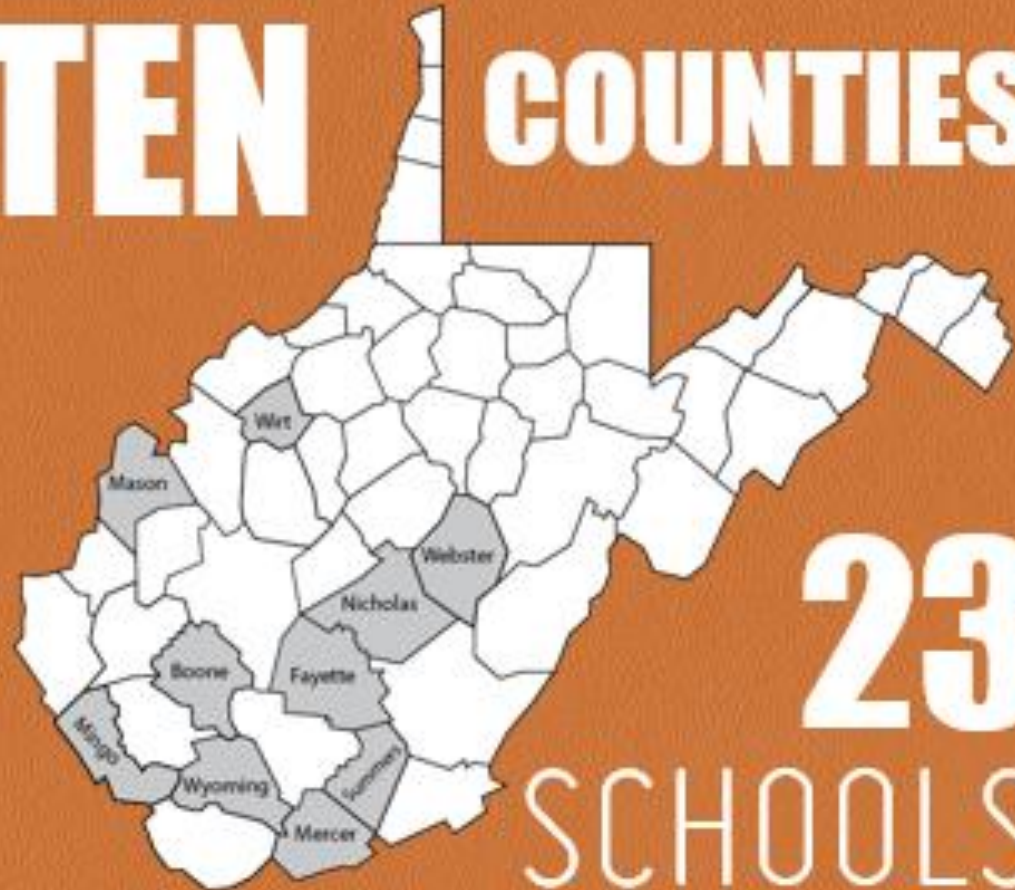


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# WEST VIRGINIA GEAR UP STUDENTS

# TEN COUNTIES



**IDENTIFYING STUDENTS AT THE POSTSECONDARY LEVEL**

## **SERVING WV GEAR UP STUDENTS ON CAMPUS**

Partner institutions must identify WV GEAR UP students once they have enrolled at their institution.

### **PRIORITY GROUP: CLASS OF 2019**

Must be first-time freshmen enrolled for Fall 2019 semester and a 2019 high school graduate from 1 of 18 WV GEAR UP schools serving priority students

### **COHORT GROUP: CLASS OF 2020**

Must be first-time freshmen enrolled for Fall 2020 semester and a 2020 high school graduate from 1 of 23 WV GEAR UP schools serving cohort students

### **FRESHMAN STATUS AND LENGTH OF SERVICES**

Students with college credit hours from early entrance or dual enrollment courses with a status other than freshman are still eligible for services. Students may only receive transition and first-year services for one year.

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## PROGRAM OBJECTIVES

Successful High School-to-Postsecondary Transition

Increase/Ensure First-Year Fall-to-Spring Retention

Increase/Ensure First-Year Fall-to-Fall Retention

Ensure Students Academic Progression for College Success

Connect Students to Campus Resources

Increase Parent Engagement

Ensure Student Satisfaction with Services and Resources

Adhere to Federal and State Reporting/Outcome Guidelines



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# DIRECT SERVICES MINIMUM REQUIREMENTS

Individual Success Plan Development

Intrusive Academic Advising and Case Management Services

Txt 4 Success Services

Fall and Spring Mid-Semester Progress Meeting

Academic Support Services: Tutoring

Early Alert System

Student Success and First Generation Workshops

Parent/Guardian and Family Campus Event

Connect Students to Resources on-and-off Campus

Annual GEAR UP Survey Administration

Student Participation in Campus Activities



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# TIMELINE

## IMPLEMENTATION OF SERVICES: PROGRAM TIMELINE

Individual Success Plan development should be complete for each student by October 15, 2019.

Academic advising should be ongoing to meet the needs of the students, while adhering to certain institutional deadlines. Services should provide students with assistance in enrollment and registration, financial aid counseling, and all other wrap around services deemed necessary to aid the student in succeeding each semester. These services also include assisting students with registration and connecting students to the financial aid office to ensure FAFSA completion for the 2019-20, and 2020-21 academic years. All contact hours must be tracked and reported, including sessions scheduled with students via conference call.

Continuance from secondary to postsecondary and ongoing through first year of college. Program administered in conjunction with the West Virginia Higher Education Policy Commission's statewide initiative.

Mid-semester meetings with each students should occur around mid-terms.

Provide or connect students with campus tutoring services as needed. Services should be ongoing during Fall 2019 and Spring 2020 semester. All tutoring contact hours must be tracked and reported.

Establish an early alert system to aid in effective case management services during the Fall 2019 and Spring 2020 semester.

Organize on-campus workshops each semester for WV GEAR UP freshmen. These can be workshops covering topics specific to first-generation, low-income students, time management, effective study habits, financial aid/literacy, or other related topics. A minimum of two workshops shall be provided each semester.

At minimum, provide one parent/guardian and family event each semester. The first event must be completed by November 15, 2019, the second event by April 15, 2020. Parent participation must be tracked.

Survey administered in Spring 2020.


**2019-2020**  
PROGRAM YEAR  
APPENDIX I

## TRANSITION AND FIRST YEAR PROGRAM IMPLEMENTATION TIMELINE

Internal coordinated efforts among institutional departments is crucial to the success of the West Virginia GEAR UP Transition and First Year Initiative. Given that the institution has certain programs and services already in place, Transition and First Year Program staff serving WV GEAR UP students will collaborate with institutional leadership to avoid duplication of efforts. A program timeline for implementation of services for the pilot year has been identified and outlined below.

DIRECT PROGRAM SERVICES	IMPLEMENTATION OF SERVICES: PROGRAM TIMELINE
Individual Success Plan Development	Individual Success Plan development should be complete for each student by October 15, 2019.
Intrusive Academic Advising and Case Management Services	Academic advising should be ongoing to meet the needs of the students, while adhering to certain institutional deadlines. Services should provide students with assistance in enrollment and registration, financial aid counseling, and all other wrap around services deemed necessary to aid the student in succeeding each semester. These services also include assisting students with registration and connecting students to the financial aid office to ensure FAFSA completion for the 2019-20, and 2020-21 academic years. All contact hours must be tracked and reported, including sessions scheduled with students via conference call.
Text 4 Success Services	Continuance from secondary to postsecondary and ongoing through first year of college. Program administered in conjunction with the West Virginia Higher Education Policy Commission's statewide initiative.
Fall and Spring Mid-Semester Progress Meeting	Mid-semester meetings with each students should occur around mid-terms.
Academic Support Services: Tutoring	Provide or connect students with campus tutoring services as needed. Services should be ongoing during Fall 2019 and Spring 2020 semester. All tutoring contact hours must be tracked and reported.
Early Alert System	Establish an early alert system to aid in effective case management services during the Fall 2019 and Spring 2020 semester.
Student Success and First Generation Workshops	Organize on-campus workshops each semester for WV GEAR UP freshmen. These can be workshops covering topics specific to first-generation, low-income students, time management, effective study habits, financial aid/literacy, or other related topics. A minimum of two workshops shall be provided each semester.
Parent/Guardian and Family Campus Event	At minimum, provide one parent/guardian and family event each semester. The first event must be completed by November 15, 2019, the second event by April 15, 2020.
Connect Students to Resources on-and-off Campus	Required and ongoing.
Annual GEAR UP Survey Administration	Survey administered in Spring 2020.
Student Participation in Campus Activities	Ongoing.

First year transition services, and student and parent participation must be tracked monthly. Reports are due by the 15th of the following month. All reports should be submitted to the Coordinator of Transition and First-Year Programs at the West Virginia Higher Education Policy Commission. Submission of monthly reports are required to be submitted on approved WV GEAR UP Transition and First-Year Program reporting forms.



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TRANSITION AND FIRST YEAR PROGRAM | 2019-2020



## WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM Implementation for Partner Institutions



# CASE MANAGEMENT MODEL

*A wraparound approach to support student success!*



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# INDIVIDUAL SUCCESS PLAN

## TRANSITION AND FIRST YEAR PROGRAM INDIVIDUAL SUCCESS PLAN (ISP)

WEST VIRGINIA GEAR UP

FIRST NAME MI LAST NAME STUDENT ID

CELL PHONE HOME PHONE INSTITUTION

By providing your cell phone number, you agree to receive text-based communication from the West Virginia Higher Education Policy Commission and the West Virginia Community and Technical College Education, administered under the College Foundation of West Virginia (CFWV). Your information will not be shared with institutions other than the indicated institution, nor will your information be shared with vendors or other third-party organizations. Standard text-messaging rates apply and you are responsible for all messaging costs. This may also apply at any time by replying to any text sent.

MAILING ADDRESS EMAIL

HIGH SCHOOL HS GRADUATE

### WV GEAR UP STUDENT GROUPS:

- HERO MEMBER (Higher Education Readiness Officer)
- Student Success Society Member

### ENROLLED IN OTHER FEDERAL

- Student Support Services
- Other TRIO Program

HOURS ENROLLED: FALL 2019: \_\_\_\_\_ SPRING 2020: \_\_\_\_\_ FRESHMAN ORIENTATION Date

Full-time is 12 credit hours or more during fall or spring term and 6 credit hours during summer term. Full-time is any number of credit hours less than 12 for the fall or spring or less than 6 for the summer term. Students are strongly encouraged to take 18 credit hours each semester and successfully complete their degrees of college with 30 semesters.

ACADEMIC MAJOR: ANTICIPATED GRADUATION DATE

### FIRST-YEAR GOALS:

- ①
- ②
- ③

## TRANSITION AND FIRST YEAR PROGRAM INDIVIDUAL SUCCESS PLAN (ISP)

WEST VIRGINIA GEAR UP

PAGE 2 OF 2

2019-2020  
PROGRAM YEAR  
APPENDIX I

An individual success plan maps out support services available to assist students in their transition to and through their first year of postsecondary education. Use the direct services listed below as a discussion guide during the first ISP meeting with the student. Students should be made aware of services available to them to support first-year success. Use the "other" category to identify support services not listed below or off-campus resources.

DIRECT SERVICE	STUDENT SUPPORT SERVICES
ACADEMIC ADVISING / REGISTRATION	<input type="checkbox"/> ENROLLMENT <input type="checkbox"/> REGISTRATION <input type="checkbox"/> ADVISING <input type="checkbox"/> COURSE ADD/DROP/WITHDRAWAL
FINANCIAL AID / FINANCIAL ASSISTANCE	<input type="checkbox"/> FINANCIAL AID REVIEW <input type="checkbox"/> WORK STUDY <input type="checkbox"/> INSTITUTION ACCOUNT INQUIRY
ACADEMIC SUPPORT SERVICE: TUTORING	<input type="checkbox"/> REQUEST TUTORING SERVICES: SUBJECT: _____
PERSONAL ADVISING/COUNSELING	<input type="checkbox"/> PERSONAL ADVISING <input type="checkbox"/> COUNSELING REQUESTED
TRIO SUCCESS	<input type="checkbox"/> TRIO PROGRAM ENROLLMENT
RESOURCES / SERVICES REFERRALS	<input type="checkbox"/> DISABILITY SERVICES <input type="checkbox"/> MENTORING <input type="checkbox"/> OTHER CAMPUS SUPPORT
WORKSHOPS	<input type="checkbox"/> STUDY SKILLS <input type="checkbox"/> TIME MANAGEMENT <input type="checkbox"/> OTHER WORKSHOP: _____
CAREER / JOB PLACEMENT SERVICES	<input type="checkbox"/> CAREER SERVICES <input type="checkbox"/> JOB SEARCH/PLACEMENT <input type="checkbox"/> RESUME WRITING
TRANSFER/GRADUATION INFORMATION	<input type="checkbox"/> INDICATE DESIRE TO TRANSFER <input type="checkbox"/> GRADUATION REQUIREMENTS REVIEW
OTHER (i.e. Textbooks)	

### NOTES:

### CONSENT

I, (Name of the Student) \_\_\_\_\_ I authorize (Name of the Institution) \_\_\_\_\_ and their authorized representative(s) to release information to West Virginia GEAR UP program for evaluation and reporting purposes during the time I am enrolled at the institution. The type of information to be released under this consent includes: Participation in GEAR UP sponsored or related campus and program activities and services only.

I understand the information may be released electronically, orally or in the form of copies of written records. I understand that I may revoke this Consent upon providing written notice to the Transition and First Year Program Coordinator. I further understand that until this revocation is made, this consent shall remain in effect while enrolled at the institution and my educational records will continue to be provided to West Virginia GEAR UP for the specific purpose described above until such time that I am no longer enrolled at the institution. By signing below, I agree to the above plan. I will keep staff informed of any changes in my plan including address, phone numbers, email, etc. I understand that I must continue to meet with advising staff each semester.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_ Transition and First Year Program Staff Signature \_\_\_\_\_ Date \_\_\_\_\_



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TRANSITION AND FIRST YEAR PROGRAM | 2019-2020



Gaining Early Awareness and Readiness for Undergraduate Programs  
TRANSITION AND FIRST YEAR PROGRAM | 2019-2020



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Implementation for Partner Institutions







# TXT 4 SUCCESS

*A statewide initiative.*



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## PROJECT STAFFING: PARTNER INSTITUTIONS

College partners are responsible for providing an on-site supervisor who will spend approximately five (5) percent of his/her time working with the Transition and First Year Program staff member to provide administrative guidance and supervision.



WV GEAR UP is a dollar-for-dollar match grant. Partners are requested to evaluate expenditures to determine if expenditures that meet GEAR UP goals can be reported as match. These funds must be non-federal dollars and may not be used for match for any other federal program.

Expected match required from college partners includes, but is not limited to, approximately five (5) percent of time and effort of an on-site supervisor, office space, and utilities. In-kind match documentation must be submitted each year as requested by the West Virginia Higher Education Policy Commission.



WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM  
Implementation for Partner Institutions





## TRANSITION AND FIRST YEAR STAFF POSITION

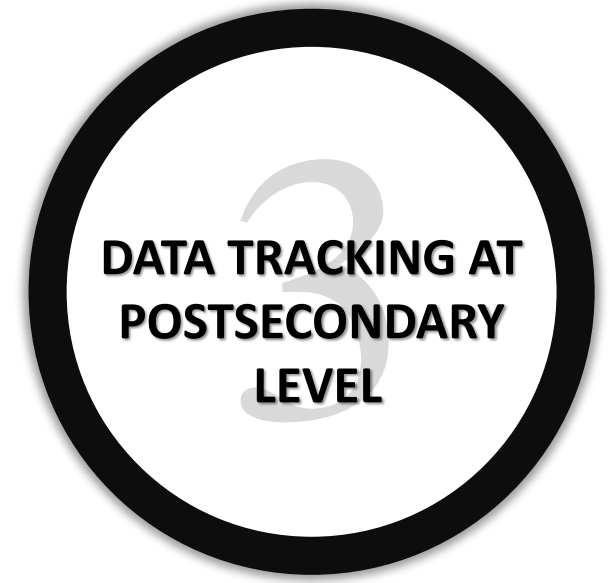


- Position funded by WV GEAR UP and hired through postsecondary institution directly reports to designated on-site supervisor at institution (determined by campus administration)
- On-site staff may not serve students that are not eligible WV GEAR UP students
- WVHEPC staff provide administrative oversight of the project and determine all reporting measures as defined by the USDOE
- A Coordinator of Transition and First Year Programs, under the direction of the Director of Student Services based at WVHEPC, will serve all partner campuses for this project (start date TBD)



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# 1 TRACKING STUDENT SERVICES

The initial list of students eligible to receive services can be obtained from the Admissions office at each institution.

Staff can request a list (names and contact information) of all registered students who are 2019 graduates of the 18 schools.

If staff experience any difficulties obtaining a list, you can contact Zornie Georgieva ([Zornitsa.Georgieva@wvhepc.edu](mailto:Zornitsa.Georgieva@wvhepc.edu)) for assistance.



WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM  
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## OUTCOMES AND PERFORMANCE MEASURES

Individual Success Plan Development for All Students

% of Students Participating in Freshman Orientation

Exceed Institutional Fall-to-Spring First-Year Retention Rate

Exceed Institutional Fall-to-Fall First-Year Retention Rate

% Students Successfully Completing 15 Credits each Semester

% Students Successfully Completing 30 Credits First-Year

% Students Completing Fall Semester with 2.0 GPA or Higher

% Students Completing Spring Semester with 2.0 GPA or Higher

Service Hours: Academic, Financial Aid, and Personal Counseling

50% Students will Participate in One Workshop Each Semester

50% of GEAR UP Parents will Participate in a Campus Event

Meet 80% Student Survey Response Rate

80% GEAR UP Student FAFSA Completion by April 15, 2020



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# 2 REPORTING REQUIREMENTS

## SERVICE TRACKING SHEET

INSTITUTION: \_\_\_\_\_

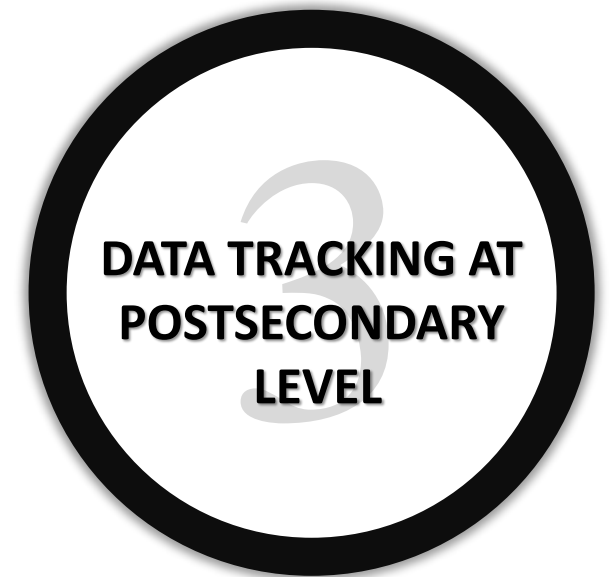
REPORTING STAFF MEMBER: \_\_\_\_\_

First year transition services, and student and parent participation must be tracked monthly. Reports are due by the 15th of the following month. All reports should be submitted to the Coordinator of Transition and First-Year Programs at the West Virginia Higher Education Policy Commission. Submission of monthly reports are required to be submitted on approved WV GEAR UP Transition and First-Year Program reporting forms.

STUDENT NAME	STUDENT ID	DATE	TIME ENGAGED	ACTIVITY TYPE
1. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
2. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
3. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
4. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
5. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
6. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
7. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
8. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
9. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
10. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
11. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
12. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other
13. _____				<input type="radio"/> Academic Advising <input type="radio"/> Financial Aid <input type="radio"/> Counseling <input type="radio"/> Other



All of this information would be collected through the tracking sheets which will be collected on monthly basis. Campus staff would not have to compile this information. The central office will be responsible for compiling all participation data and calculating the percentages. The central office will also provide periodic updates on which students and % of students are participating in the campus events and are utilizing services.



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## OUTCOMES AND PERFORMANCE MEASURES

- Individual Success Plan Development for All Students
- % of Students Participating in Freshman Orientation
- Exceed Institutional Fall-to-Spring First-Year Retention Rate
- Exceed Institutional Fall-to-Fall First-Year Retention Rate
- % Students Successfully Completing 15 Credits each Semester
- % Students Successfully Completing 30 Credits First-Year
- % Students Completing Fall Semester with 2.0 GPA or Higher

- % Students Completing Spring Semester with 2.0 GPA or Higher
- Service Hours: Academic, Financial Aid, and Personal Counseling
- 50% Students will Participate in One Workshop Each Semester
- 50% of GEAR UP Parents will Participate in a Campus Event
- Meet 80% Student Survey Response Rate
- 80% GEAR UP Student FAFSA Completion by April 15, 2020



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While the central office can obtain this information for reporting purposes, campus staff should be able to track this information in real time through Banner to gauge if they are on track to meet the performance goals. For example, when spring registration opens, staff should be able to check in Banner which students have registered for classes for the spring semester. Staff can access this information to plan their day-to-day activities and outreach efforts but those elements do not have to be reported to the central office on monthly basis.

**3**  
**DATA TRACKING AT  
POSTSECONDARY  
LEVEL**



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## BUDGET AND FISCAL RESPONSIBILITY



- For each Federal grant program there are applicable federal statutes and/or codified Federal program regulations.
- Included in the subrecipient award are applicable West Virginia Code citations and administrative rules. This information is to be used by the institutions to determine the manner in which the work is performed under this subrecipient agreement.
- Institutions are responsible for obtaining this information and the listing is not to be deemed inclusive, but informative of relevant statutes and regulations.



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# BUDGET AND FISCAL RESPONSIBILITY



- An annual expenditures report of payments received and actual expenditures incurred must be submitted to the Commission by October 15th each year.
- A final report reconciling total payments received and actual expenditures incurred for the term of this agreement must be submitted to the Commission within forty-five (45) days after the performance period. Any payments received in excess of the actual expenditures must be made payable to the WV Higher Education Policy Commission.
- Program service, student-level participation and progress reports must be submitted monthly and as requested to adhere to changing requirements for the Federal Annual Performance Report.
- Miscellaneous reports as requested.



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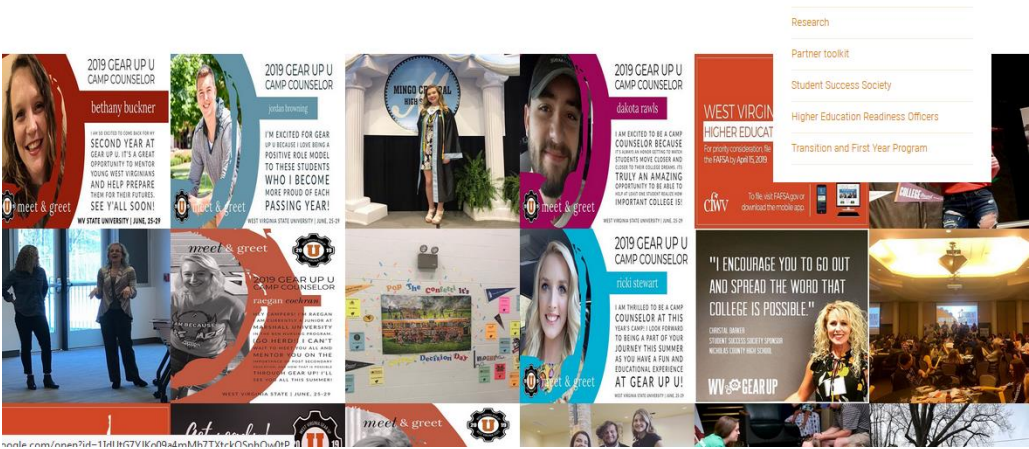


# BUDGET AND FISCAL RESPONSIBILITY

“ WV GEAR UP State fiscal and data policies and requirements are posted on the internet at [www.wvgearup.org](http://www.wvgearup.org). These policies and requirements ensure compliance at the Federal level, as well as State level, as developed for the WV GEAR UP grant.



About us ▾ Upcoming events College info Resources ▾

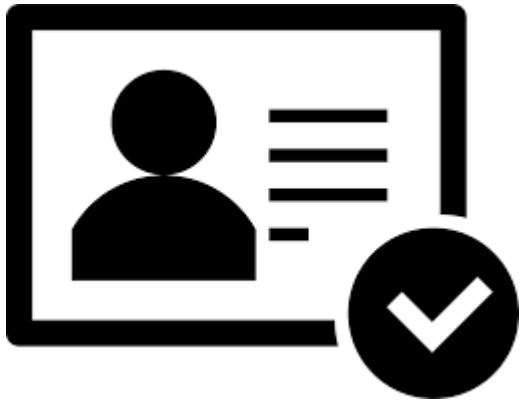


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## ALLOWABLE EXPENSES



- Federal GEAR UP dollars must be used to support GEAR UP students and their parents only.
- Allocated monies must be used to cover expenses as they DIRECTLY relate to the scope of services.
- Food expenditures cannot exceed \$9.00/head and may only be used for GEAR UP students and their parents.
- Funds cannot be used to supplant.
- Institutions may use funds to support those students with plans to matriculate to their campus during the transition from high school to college, **not to recruit**.
- Money cannot be used for promotional and marketing items (i.e. college swag).



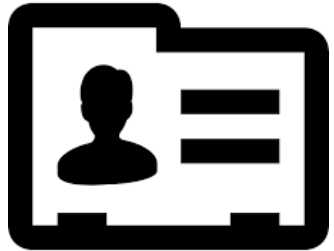
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## WV GEAR UP TRANSITION AND FIRST YEAR PROGRAM Implementation for Partner Institutions





# Elizabeth A. Manuel

Interim Director of Student Services | Director of WV GEAR UP  
WV Higher Education Policy Commission | WV Community and Technical College System

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Email: [Elizabeth.Manuel@wvhepc.edu](mailto:Elizabeth.Manuel@wvhepc.edu)

Phone: 304.558.0655



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