



PROGRAM BUDGET MEETING 2023-2024



Acronym: Gaining Early Awareness and Readiness for Undergraduate Programs

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

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



\$24.5 Million

SEVEN YEARS

1 of 4 State Grants Funded

WV Higher Education Policy Commission
Fiscal Agent

Service Region
11 Counties Served
50 Schools

College Partners
Glenville State University | Marshall University | SWVCTC

West Virginia GEAR UP
Service Areas and Schools
 2021-22 Academic Year



SOUTHERN REGION - served by Southern West Virginia Community and Technical College

BOONE: Madison Middle School; Scott High School; Sherman Junior High School; Sherman High School; Van Junior/Senior High School

LOGAN: Chapmanville Middle School; Chapmanville Regional High School; Logan Middle School; Logan High School; Man Middle School; Man High School

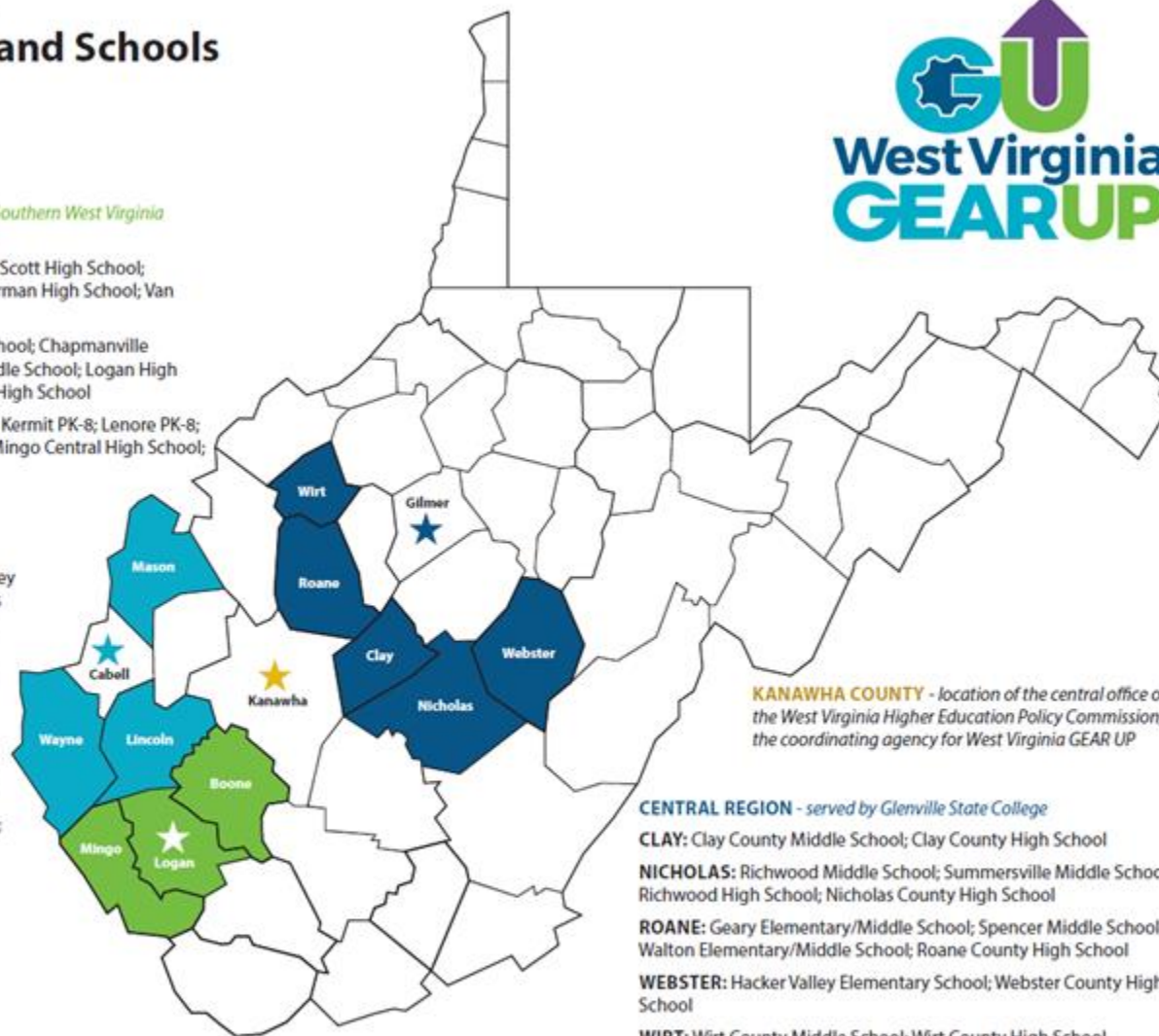
MINGO: Burch PK-8; Gilbert PK-8; Kermit PK-8; Lenore PK-8; Matewan PK-8; Williamson PK-8; Mingo Central High School; Tug Valley High School

SOUTHWESTERN REGION - Marshall University

LINCOLN: Duval PK-8; Guyan Valley Middle School; Hamlin PK-8; Harts PK-8; Lincoln County High School

MASON: Hannan High School; Point Pleasant Junior/Senior High School; Wahama High School

WAYNE: Buffalo Middle School; Ceredo-Kenova Middle School; Crum PK-8; Fort Gay PK-8; Vinson Middle School; Wayne Middle School; Spring Valley High School; Tolsia High School; Wayne High School



KANAWHA COUNTY - location of the central office of the West Virginia Higher Education Policy Commission, the coordinating agency for West Virginia GEAR UP

CENTRAL REGION - served by Glenville State College

CLAY: Clay County Middle School; Clay County High School

NICHOLAS: Richwood Middle School; Summersville Middle School; Richwood High School; Nicholas County High School

ROANE: Geary Elementary/Middle School; Spencer Middle School; Walton Elementary/Middle School; Roane County High School

WEBSTER: Hacker Valley Elementary School; Webster County High School

WIRT: Wirt County Middle School; Wirt County High School

WWW.WVGEARUP.ORG

LOCAL STAFF

Site Coordinators

Each partner school will have a dedicated project staff member, known as a site coordinator (SC). SCs are LEA employees contracted by GEAR UP to work above-and-beyond normal school hours to implement building-level programs and activities.

SCs are supported and managed by College Access and Success Program Directors (HEPC staff) to ensure effective program implementation.

County Coordinators

Each county has identified one county coordinator. This district staff member will dedicate 5 to 10% of their time (as match) to support the work in GEAR UP schools.



HYBRID MODEL

TWO COHORTS

Class of 2027 and 2028

PRIORITY GROUP

Each year's senior class

FIRST-YEAR OF POSTSECONDARY

Each year beginning in year 2

STATEWIDE SERVICES

Ongoing

WV GEAR UP GRANT GOALS

GOAL 1:

Increase the academic performance and preparation for postsecondary education for GEAR UP students.

GOAL 2:

Increase the rate of high school graduation and participation in postsecondary education for GEAR UP students.

GOAL 3:

Increase educational expectations and knowledge of postsecondary options, preparation and financing among GEAR UP students and their families.

GOAL 4:

Increase students' and educators' hope and expectations for students' future postsecondary plans.



FISCAL ADMINISTRATION

Workplan is approved by the USDOE Federal Program Officer

Funds may only be used to implement approved workplan for specific grade level, GEAR UP students/families only

Supplanting is unallowable

Funds invoiced monthly on a reimbursement basis

Expenditures must follow federal regulations and uniform guidance

APPROVED WORKPLAN

WV GEAR UP WORKPLAN

GRANT YEAR 3: September 25, 2023 – September 24, 2024



SURVEY, RESEARCH & DATA

Student and Parent Surveys
Surveying 8th, 9th, 10th, and 12th Grade Students
Surveying 8th, 9th, 10th Grade Parents
November 2023 - January 2024
Target: 80% Student | 50% Parent

HERO Interviews and Focus Groups

March – April 2024
Target: Cohort Students (Select Schools)

School Personnel Surveys

Surveying 7th – 12th Grade Educators and Staff
April - May 2024
Target: 60% Response Rate



EVENT REGISTRATION

Required for all workplan activities. Regional PD's must approve all non-recurring events by email. Event registration should be submitted two weeks in advance.



DATA COLLECTION

Activity Backup Documentation
All GEAR UP events and activities must be supported by backup documentation.
Due by the 15th of the following month to the regional program director for entry and validation.



REQUIRED ADMINISTRATIVE MEETINGS

WV GEAR UP Grant Program Meetings
September 14, 2023 (From Year 2 Workplan)
November 9, 2023 | January 11, 2024 | March 7, 2024 | April 25, 2024
July 2024 (Date TBD)

WV Student Success Summit

July 2024 | Team of 4

Year 4 Budget Planning Meeting

August 2024

Grant Administration Meetings

TBD



NATIONAL GEAR UP WEEK

Celebrate National GEAR UP Week
September 25-29, 2023



CLASSROOM ENHANCEMENTS

Technology Enhancements: 9th Grade Cohort Only
Ordered by October 15th, Installed by December 1



ADDITIONAL GRANT ACTIVITIES/SERVICES

Pending approval, additional activities, or services meeting GEAR UP goals and objectives may be provided during the academic year.
Requires WV GEAR UP administrative approval/coordination.



| MINIMUM REQUIRED ACTIVITIES | SITE LEVEL COORDINATION | CENTRAL OFFICE COORDINATION | HOSPITALITY | MATERIALS AND SUPPLIES | COMPLETION DEADLINE | COMMENTS AND WORKPLAN CLARIFICATION |
|---|-------------------------|-----------------------------|-------------|------------------------|---------------------|--|
| | | | | | | |
| Welcome to GEAR UP Day | ● | | ● | ● | September 2023 | Host a welcome to GEAR UP awareness day for students as part of National GEAR UP Week. The event must include information about the federally funded GEAR UP grant and services for the 2023-24 academic year for 12th-grade students near to the GEAR UP program. Site Coordinators are asked to utilize the WV GEAR UP launch toolkit developed by the central office. Resources in the form of informational handouts are also available. |
| CFWV Text 4 Success Opt-In (Target 75% of Senior Class) | ● | | | ● | October 2023 | WV GEAR UP and College for WV provides college access and success counseling via text message. Provide all priority students and parents the opportunity to sign up for text messages through an organized in-school event/activity where students have access to a computer. Each school's goal is a minimum of 75% of senior class enrollment. |

WV GEAR UP WORKPLAN: CLASS OF 2024 PRIORITY GROUP



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| Student Leadership Academy | ● | ● | ● | ● | September 2023 | WV GEAR UP's central office team will coordinate the 2023 Student Leadership Academy held in Charleston, WV at the Clay Center for the Arts and Sciences (lunch provided). Site Coordinators are asked to register to bring 9th-grade students. Only students from Cohort 1 are eligible to attend. Schools will budget for buses and substitutes from their county grant budget. |
| Mentor Summit | | ● | ● | ● | October 2023 | Student Success Society sponsors will attend the 2023 Mentor Summit in Charleston, WV. Mileage reimbursement and/or funding for a substitute teacher, while sponsors are out of the building, will be available through the GEAR UP county grant agreement. Sponsors will receive training and program details that will enable them to begin working with their SSS members beginning in October through May of the academic year. |
| College Application and Exploration Week | ● | ● | ● | ● | Oct 30 - Nov 3, 2023 | Cohort activities MUST include computer lab time for students to explore colleges and careers, and college planning resources. Site coordinators must register their school as a participant in CAEW. Toolkits full of CAEW resources will be provided to staff. Site coordinators are encouraged to scale this event as part of a school-wide effort involving educators and other staff. |
| Family Action Network | ● | ● | | ● | Ongoing | The WV GEAR UP grant includes the creation of the Family Action Network team to build capacity for the mission of GEAR UP. The WV GEAR UP central office will coordinate the FAN leadership initiatives. This effort will coincide with the parent engagement component of the grant. |
| Higher Education Readiness Officers | ● | ● | ● | ● | Ongoing | Implement and oversee school-level HERO's student leadership group. Implement HERO workplan/challenges. A minimum of 8 meetings with HERO students throughout the academic year is required. Additional details to be shared during GEAR UP staff meetings. |
| In fall 2023 WV GEAR UP will launch the Student Success Society. Student Success Society members are identified and | | | | | | |

Note: All non-rec should be submitted two weeks in advance when possible.
Note: Food exp



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| Faculty Senate Presentation | ● | | | ● | December 15, 2023 | Site coordinators will present to faculty and staff to ensure they are aware of the goals and services of the WV GEAR UP grant. Additionally, faculty and staff will be made aware of opportunities available for them to assist and participate in WV GEAR UP events and activities as addressed during the annual personnel survey. |
| In-State College Campus Visit | ● | | ● | ● | April 1, 2024 | One in-person college visit for 8th-grade students at a WV college or university. Site coordinators are highly encouraged to align this trip with other activities such as a job-site visit. In unique circumstances due to geographical location, out-of-state college trips may be considered if they do not include overnight stays. Regional WV GEAR UP Days on college campuses in conjunction with the three partner institutions may be planned through the regional program director. |
| Transition to High School Family Event | ● | | ● | ● | May 15, 2024 | Site coordinators will host an event or activity focusing on educating students and parents about the successful transition from middle to high school. Topics to be covered must include the importance of grades and academic credits, goal setting, career pathways, and an introduction to financial aid and scholarships, at a minimum. |
| GEAR UP U Summer Academy | ● | ● | ● | ● | June 2024 | Hosted by the Central Region Program Director at Glenville University. The GEAR UP U Application process will launch during the staff meeting in January 2024. The GEAR UP U application deadline will be announced at that time. Additional information regarding the number of participants per school, the registration/enrollment process, transportation, and much more will be provided. |
| Academic Enrichment: See Below | | | | | | |
| STEM/Pre-Algebra Support Program | ● | | | ● | Ongoing | Continued use of Texas Instruments equipment with the 8th grade Math and Science classes. Teachers who received TI professional development will utilize the equipment in their respective classrooms. Tracking the usage of classroom-wide activities is required. A minimum of 4 class periods dedicated to the equipment each term is required. |

Note: All non-recurring (academic enrichment) events/activities are required to be approved by the regional program director through the event notification form. No event may take place unless it has been approved by the RPD. Event notifications should be submitted two weeks in advance when possible.

Note: Food expenditures not to exceed \$13/head for school-level events.



Year 2 Grant Agreements

All GEAR UP grant agreements have an end date of September 24, 2023. Final invoices are due 45 days after that date with backup documentation.

Unspent funding is reallocated to support GEAR UP students during year 3.

County match documentation due October 2023.

Year 3 Grant Agreements

Service Dates

September 25, 2023 – September 24, 2024

Invoicing

Monthly invoicing is due by the 15th of the following month with backup documentation of expenditures.

Regional program directors will send copies to site coordinators to spot check invoices sent for processing.

BUDGET ALLOCATIONS:

Notes:

Enrollment Numbers: provided by Zorrie Georgieva based on most recent available at WVDE, Zoom August 2023.

Indirect cost-rates for 2023-24 provided by WV Department of Education, Sam Pauley in August 2023.

Academic Enrichment Notes:

8th Grade: Texas Instruments Academic Classroom Support

9th Grade: Brainfuse Online Tutoring for Algebra I Support

12: Grade: Use of funds permitted for allowable services outlined in workplan.

Classroom Enhancements Notes:

The purchase of technology/classroom enhancements only permitted for 9th grade class in year three of grant.

Please note: The detailed budget broken out by line items will be included in the grant agreement. The materials and supplies line item includes general supplies, food, and for the 9th grade class classroom enhancements.

BUDGET ALLOCATIONS: COHORT 2 – 8th Grade

Budget Notes:

General Materials and Supplies: \$500

Hospitality: Food for approved workplan events

Tier 1: Less than 100 = \$1,000

Tier 2: 101-150 = \$1,500

Tier 3: Above 150 = \$2,000

Tier 4: Above 200 = \$2,500

Subs (Salary and Fringe): \$1,000

Subs for SC Meetings/Events

Travel: \$4,000

SC Meetings and SSS Team (2): \$3,000

Travel for College Visit: 1,000

BUDGET ALLOCATIONS: COHORT 1 – 9th Grade

Budget Notes:

Classroom Enhancements:

Only permitted for 9th grade cohort

Tier 1: Less than 100 = \$3,000

Tier 2: 101-150 = \$4,000

Tier 3: Above 150 = \$5,000

Tier 4: Above 200 = \$6000

General Materials and Supplies:

Tier 1-2: \$1,500

Tier 3-4: \$2,500

Hospitality: Food for approved workplan events

Tier 1: Less than 100 = \$2,000

Tier 2: 101-150 = \$2,500

Tier 3: Above 150 = \$3,000

Tier 4: Above 200 = \$4,000

Subs (Salary and Fringe): \$1,500

Subs for SC Meetings/Events/Mentor Summit

Travel: \$5,000

SC Meetings and SSS Team (2): \$3,000

Travel for Student Events: \$2,000

BUDGET ALLOCATIONS: PRIORITY – 12th Grade

Budget Notes:

General Materials and Supplies: \$1,000

Supplies for CAEW/FAFSA/College Decision Day/Txt 4 Success

Subs (Salary and Fringe): \$1,000

Subs for SC Meetings/Events

Hospitality:

Tier 1: Less than 100 = \$1,000

Tier 2: 101-150 = \$1,500

Tier 3: Above 150 = \$2,000

Tier 4: Above 200 = \$2,500

Travel: \$4,000

SC Meetings and SSS Team (2): \$3,000

Travel for Student Events: \$1,000

Academic Enrichment:

Dual enrollment, AP Exam, SAT/ACT Prep, approved special projects. See workplan.

Tier 1: Less than 100 = \$2,000

Tier 2: 101-150 = \$3,000

Tier 3: Above 150 = \$4,000

Tier 4: Above 200 = \$5,000

Academic Enrichment

Priority 12th Grade:

- Dual Enrollment (not funded by Dual Enrollment Legislative Initiative)
- AP Testing
- SAT/ACT Support
- Other projects **upon approval** (ECA, etc.)

Cohort 1-9th Grade:

- Brainfuse: 24/7 Online Tutoring – Preference to Math support
- Goal: Increase Algebra I Passage

Cohort 2-8th Grade:

- Texas Instruments Technology – Classroom Usage
- Additional PD may be available

NEXT STEPS

9th Grade Cohort:

Work with school administrators/teams to determine classroom enhancement purchases.

County Coordinators submit a final county-wide technology sheet to their Regional Program Director one week after the meeting, no later than August 22nd.

SUBGRANTS SIGNING DATE

Grant agreements will be emailed by September 8th to secure respective Superintendent's signature. Once returned, agreements will be signed by the HEPC.

An executed copy of the agreement, along with a copy of the monthly invoice template to be used by counties to request reimbursement will be returned to the county.

TECHNOLOGY PURCHASES

Orders Placed: October 15th

Installation and Usage: December 1st

Technology/Classroom Enhancement Tracking:

Tags provided at the September GEAR UP meeting

Cumulative Classroom Enhancement Tracking Sheet Due by January 15th

POLICIES AND PROCEDURES

WEST VIRGINIA GEAR UP POLICIES AND PROCEDURES GUIDE

1018 Kanawha Boulevard East
Suite 700
Charleston, WV 25301
(304) 558-0655
www.wvgearup.org



(3) alternatives available; and (4) the type, life expectancy, condition, and value of the property leased. Rental arrangements should be reviewed periodically to determine if circumstances have changed, and other options are available.

Student Activity Costs: generally allowable, with exceptions
Costs incurred for intramural activities, student publications, student clubs, and other student activities, are allowable, unless specifically provided for in the grant agreement.

Supplies: allowable
Costs incurred for supplies to carry out the grant are allowable. Supplies have a per-unit cost of less than \$5,000.

Travel Costs: 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 the institution. Travel outside of the United States requires prior approval.

NOTE: Just because a cost is interpreted as being allowable under the OMB cost principles, it is not guaranteed that you will be able to make that expenditure. The West Virginia Higher Education Policy Commission is the primary entity that determines if an allowable cost is acceptable. This may happen when, for example, a cost identified as allowable under the circular may be disallowed in program regulations or statute or fail to pass the USDOE's judgment that it is justified, allowable, or reasonable.

County Budget Policy and Procedures

Each fiscal year, WV GEAR UP Federal grant funding will be allocated by the WV GEAR UP Administrative Office to each of the 11 eligible counties. Funds will be officially awarded through a grant agreement to each county. Allocations are contingent until funding for the next fiscal year is approved and the Grant Agreement is executed with the counties. Funding categories will be allocated based upon priorities set by the WV GEAR UP Administrative Office to ensure academic enrichment activities occur as well as social and outreach programs are accomplished.

Schools and counties will have flexibility in budgeting for the grant activities as long as they accomplish the expected activities that will be outlined in their statement of work in the annual grant agreement. Classroom enhancements must be itemized on the budget form along with an estimated price and quantity.

Each Site Coordinator must collaborate with the school principal in developing the fiscal year budget and anticipated activities. Once approved by the school principal, the school budget must be submitted to the County Coordinator and Treasurer to review and approve. The County Coordinator and Treasurer will ensure that all school budgets agree to the grant allocation prior to submitting to the WV GEAR UP Administrative Office.

Indirect cost is allowable. The approved budget at both the school(s) and county level will be in effect for the duration of the grant unless a budget revision is required. Budget revisions require prior approval and are in effect for each school. The impact of the revisions will roll up to the county level budget and grant. Budget revision prior approvals are necessary for each of the following items:

Cumulative school transfers to budget category line-item totals that exceed 10% of the total grant for the school. Funds cannot be transferred from the academic enrichment line. Budget category line items include salary, fringe benefits, travel, materials and supplies, and consultants/contracts.

Proposed classroom enhancements exceeding \$1,000 but less than \$4,999 (see Classroom Enhancement Fiscal Policy) that was not included in the original budget.

Common GEAR UP Costs

The following list may help you determine whether your program expenses are allowable or not. It includes costs that are commonly incurred in GEAR UP or are the subject of frequent questions or discussions about their permissibility.

Alcoholic Beverages: allowable

Commencement and Convocation Costs: allowable
For education institutions, costs associated with commencement and convocations are disallowed, but costs associated with GEAR UP activities that take place during commencement events may be allowable under student activity costs if approved as part of your grant agreement.

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.

Compensation (Salaries, Wages and 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 the institution, consistently applied, and provided that the charges for work performed directly on sponsored agreements.

Fringe benefits costs should be in line with institutional policies regarding annual leave, sick leave, military leave, and employer contributions or expenses for social security, employee insurance, workmen's compensation insurance, and tuition or remission of tuition for individual employees.

Consultants and Contracts: allowable
EDGAR states that costs associated with consultants are allowable if there is a need in the project for the services and the grantee cannot meet that need by using an employee rather than a consultant.

Providing Donations and Contributions: allowable
Contributions or donations (including cash, property, and services) are allowable costs.

This should be distinguished from the match. GEAR UP may receive donations, contributions or services under the GEAR UP match guidelines.



Next

Email Follow Up

Regional PD's follow up by email with a recap.

Submit Classroom Enhancement Purchase Lists

After budget meeting, county coordinators will compile and submit CE lists to RPD.

Grant Agreements Drafted

Joanne Rutherford will email grant agreements to Superintendents for signature.

Executed Agreements

Executed agreements emailed.

Central Office Contacts

Elizabeth Manuel, Senior Director of Student Services

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(304) 558-0655 • elizabeth.manuel@wvhepc.edu

Jason (J.R.) Luyster, Assistant Director of WV GEAR UP

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Joanne Rutherford, Coordinator of Fiscal and Administrative Services

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Regional Office Contacts

Central Region:

Casey Patterson, College Access and Success Program Director

Based at Glenville State University

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Southern Region:

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Southwestern Region:

Mallory Carpenter, College Access and Success Program Director

Based at Marshall University

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PROGRAM BUDGET MEETING 2023-2024