**Year 6 Work Plan Development Guide**
**Funding period: July 1, 2023 through June 30, 2024**

GEAR UP TN Sites that plan effectively tend to have the best outcomes. The annual work plan process is designed to assist GEAR UP TN sites in clearly articulating their plans to serve students and meet GEAR UP TN goals and objectives and help anticipate administrative and statewide expectations set forth by the GEAR UP TN central office. The work plan outlines the services and activities, by program objective, that are planned for the upcoming year, in addition to the anticipated dates, number of students, costs, and budget line items impacted by the activity. GEAR UP TN goals, objectives and required services should guide work plan development as they outline what you must do and what you may do.

There are two primary work plan development documents:

1.  **GEAR UP TN Year Collaborative Work Plan and Budget** – Sites must complete one Collaborative Work Plan for their entire grant program.
2.  **GEAR UP TN Year 6 School Work Plan** – Sites must complete one School Work Plan for **each** of their direct-service schools.

A detailed description of work plan development documents is available starting on page 4.

A draft of Year 6 Work Plans should be submitted to your regional coordinator by **April 21st**. Work Plans due on April 21ˢᵗ do NOT require signatures. In an effort to minimize the number of times district and school-level administrators have to sign planning documents, Year 6 Work Plans do not require signatures until a final version is agreed upon between the GEAR UP TN central office and Collaborative personnel. Final versions of the Year 6 Work Plans are due on or before **May 26th.**

The plan will be reviewed and, if needed, you will be contacted to make revisions. This document will serve as the roadmap for your Site's GEAR UP TN grant implementation.

**Questions?** Please contact your regional coordinator with any questions or concerns regarding the Year 6 Work Plan.

**Year 5 Work Plan Development Guide**
**Table of Contents**

## 1. *WORK PLAN DEVELOPMENT BASICS*

**Work Plan Purpose**

All GEAR UP TN services must follow an approved annual GEAR UP TN work plan and budget. The purpose of the work plan is to outline a framework for service provision focused around GEAR UP TN goals and objectives. A GEAR UP TN Year 6 School Work Plan must be created for **each** direct-service school serving cohort students. Sites must complete **one** Collaborative Work Plan and Budget outlining implementation details and expenditure plans. Sites are also asked to complete a sustainability plan that details college access services that will persist beyond the GEAR UP TN project.

**National GEAR UP Goals**

1) Increase the academic performance and preparation for postsecondary education for GEAR UP TN students.
2) Increase the rates of high school graduation and enrollment in postsecondary education for GEAR UP TN students.
3) Increase GEAR UP TN students' and their families' knowledge of postsecondary education options, preparation, and financing.

**GEAR UP TN Framework and Performance Metrics**

| |
|---|
| **Rigor:** Academically prepare all students for postsecondary education through rigorous curriculum and academic support. |
| Metric 1.1: Increase the % of GU students who pass Pre-algebra by the end of the 8th grade |
| Metric 1.2: Increase the % of GU students who pass Algebra 1 by the end of the 9th grade |
| Metric 1.3: Increase the % of GU students who take two years of math beyond Algebra 1 by the 12th grade |
| Metric 1.4: Increase the % of GU students who demonstrate proficiency on state assessments in math and English |
| Metric 1.5: Increase the % of GU students who take at least one EPSO, such as dual enrollment or AP coursework |
| Metric 1.6: Increase the % of GU students who place into college level math and English without the need for remediation |
| Metric 1.7: Increase the % of GU students who achieve a 21 or higher on the ACT and qualify for the state's lottery scholarship |
| **Reach Higher**: Increase the number of GEAR UP schools with a strong college-going culture. |
| Metric 2.1: Increase the % of GU students who will report that teachers expect them to go to college |
| Metric 2.2: Increase the average daily attendance rate among GU students |
| Metric 2.3: Increase the % of GU students who are on track for graduation at the end of each grade |
| **Relevance**: Increase GU students' ability to connect career goals with educational requirements |
| Metric 3.1: Increase the % of students who report that they understand the education requirements necessary to achieve their career goals |
| **Relationships**: Increase the number of GU students who have meaningful relationships that foster academic and postsecondary success |
| Metric 4.1: Increase the % of GU family members who actively engage in activities associated with assisting students in their academic preparation |
| Metric 4.2: Increase the % of GU students who report having at least one trusting relationship with an educator |

| Raise Awareness: Increase GU students' and their families' knowledge of postsecondary education options, preparation, and financing |
|---|
| Metric 5.1: Increase the % of GU students who are on-track to apply for college, measured by completion of the ACT/SAT |
| Metric 5.2: Increase the % of GU students who report that they expect to obtain a postsecondary credential |
| Reinforce Action: Increase the rate of high school graduation and postsecondary enrollment of GU students |
| Metric 6.1: Increase the % of GU students who submit a Tennessee Promise application |
| Metric 6.2: Increase the % of GU students who submit a FAFSA |
| Metric 6.3: Increase the % of GU students who graduate from high school |
| Metric 6.4: Increase the % of GU students who enroll in postsecondary education |

**Students Served**

The grades of GEAR UP TN students that will be served, by academic year, are:

| Academic Year | Grades Served |
|---|---|
| 2022 – 2024 | 12th Grade |
| 2023 - 2024 | College Freshmen |

**Ideal Work Plan Development Team**

The ideal Work Plan development team will include:

- Project director
- Site coordinator(s)
- Principals
- School and district administrators
- Counselors, key teachers
- Collaborative partners
- Fiscal officer
- College Access Steering Committee members
- College Access Partners
- College students from the high school

## 2. *COLLABORATIVE WORK PLAN AND BUDGET*

Sites are required to complete one Collaborative Work Plan. The Collaborative Work Plan consists of 6 parts:

**Section 1: Collaborative Contact Information** – this section provides basic contact information for key grant and district personnel.

**Section 2: Direct-service School Contact Information** – this section provides basic contact information for direct-service schools and school personnel.

**Section 3: Adequacy of Facilities and Equipment** – this section provides information about the resources school districts will provide to local GEAR UP TN staff.

**Section 4: Grant Implementation Activities** – this section provides sites an opportunity to articulate their plans to fulfill the grant implementation activities outlined in the GEAR UP TN Year 6 Required Services Chart located in Appendix A.

**Section 5: Sustainability Plan –** this section allows sites to identify their most impactful cohort events and services from this year and to plan how those might continue going forward

**Section 6: Collaborative Budget** – this section allows sites to outline a budget for Year 6 implementation.  Sites should use the state budget form provided. Approved budgets for Year 6 will become the site's contract budget.

**Section 7: Signature Page** – certifying signatures by the GEAR UP TN project director and grantee director of schools.


## 3.  *SCHOOL WORK PLANS*

Use the GEAR UP TN Year 6 School Work Plan form provided by the GEAR UP TN central office to create the work plan for each direct-service school. The School Work Plan is divided into two sections: (1) Proposed Student and Family GEAR UP TN Services and (2) Proposed Professional Development Activities. Student and family services are broken down by GEAR UP TN framework focus area. For each service listed on the work plan, sites are to indicate the number of individuals to be served, objectives met, and details regarding projected cost. **The project director, direct-service school principal, and site coordinator responsible for the school are required to sign off on work plans once the planned activities and budget are agreed upon between the central office and Collaborative**.

*When developing school work plans, include activities that:*
1. Are required in the Required Services Chart (see Appendix A).
2. Support the GEAR UP TN goals, framework and performance metrics listed above.
3. Support the performance framework, strategies, and performance measures (see Appendix C).
4. Are sponsored by the GEAR UP TN central office.
5. Are used to satisfy GEAR UP TN matching requirements.

*Activities may include the following (see Appendix B for a detailed description of services):*
Student Services
- Tutoring/homework assistance
- Rigorous academic curricula
- Comprehensive mentoring
- Financial aid counseling/advising
- Counseling/advising/academic planning/career counseling
- College campus visits/college student shadowing
- Job site visit/job shadowing
- Summer programs
- Educational field trips
- Workshops supporting any of the GEAR UP TN objectives
- Texting

Family Services
- Workshops on college preparation/financial aid
- Counseling/advising
- College visits
- Family events

Professional Development for Educators
- Conferences
- Workshops/trainings

**Collaboration**

To implement the variety of services outlined in Appendices A and B, GEAR UP TN site coordinators are expected to collaborate with school counselors, teachers, College Access Steering Committee members, the local community, Collaborative partners, and the GEAR UP TN central office. GEAR UP TN site coordinators should leverage the expertise of others to ensure the most robust services are being provided to students in eligible grades at the identified GEAR UP TN target schools.

*APPENDIX A: Required Services*

# GEAR UP TN Year 6 Required Services Chart

**Rigor: Academically prepare all students for postsecondary education through rigorous curriculum and academic support.**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Data-driven academic tutoring <br> (Target: 20% of student population, specify data driven criteria) | X | | Ongoing | Tutoring must be provided using either GEAR UP TN funding or existing school-based resources. In order to fulfill the tutoring requirement, sites must provide ACT tutoring or one the following: 1) implement a tutoring program through GEAR UP TN funding; 2) enhance an existing school tutoring program through technology, transportation, staff, etc.; or 3) request a tutoring exemption from the Central Office.  All sites are required to identify available tutoring programs, when they are offered, and the intended target audience. Sites requesting an exemption must demonstrate that high-quality tutoring is accessible to all students through existing school or district resources. Sites must articulate how they will support increased academic achievement through other GEAR UP TN services. Tutoring exceptions must be submitted to regional coordinators at the time of final work plan submission. **Even if an exception is granted, sites should use the College Planning Session structure as a means of directing students toward tutoring services. Sites should also use the ACT results to determine tutoring needs.** |
| ACT Test <br> First test or retest for seniors as needed | X | | The retest is for seniors in the fall. Follow-up ASAP after the results are received for appropriate interventions. | The ACT predicts future success at the postsecondary level, and it is also used for admissions and scholarships. These scores will provide actionable insights to help educators, parents, and students make important decisions for the future.  **Every site will be responsible for meeting with each student to review their scores and develop an individualized plan for each student based upon their results.** These individual meetings may be part of the college planning sessions and transition meetings, or they can be separate. |

**Reach Higher: Create a school and community environment characterized by expectations, policies, and initiatives that support all students' pursuit of postsecondary education.**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| One GEAR UP TN Orientation/High School (Target: 90%-100% of student population) | X | | Sept. 1, 2023 | Provide a program orientation to all GEAR UP TN students to ensure they **understand the GEAR UP TN program and the opportunities available to them in the 2023 – 2024 academic year**. Sites have the option to provide separate events for parents or invite parents to the student event. Think about ways to maximize student participation. Prior GEAR UP TN implementation experience indicates that an event during school hours results in greater student participation. |
| One college visit (Target: 80%-100% of student population) ==The expectation is that each student will participate in one small group or individualized campus visit.== | X | | December 31, 2023 | Campus visits should be personalized and for small groups of students.  Individual visits may be needed for some students depending upon the postsecondary institution where they will be enrolling. **It is expected that a good faith effort is made for every student to visit the postsecondary institution where they plan to enroll after graduation.  This may be a four-year university or college, community college, or TCAT based on the student's transition plan.**  College visits should focus on the transition to higher education and the resources available on campus to help students succeed - student support services, academic resources, etc. College visits should be to institutions that match students' academic credentials and interests.  This may also include campus visits where the students attend alone or with their parents/guardians, but the site coordinator should help coordinate the visits. The GEAR UP TN Central Office staff will send each coordinator a no participation report, listing senior students who have not attended a college visit during the fall semester. Each site coordinator will work with their regional coordinator to increase student participation prior to the due date and to ensure high-quality campus visits. Encourage those students not expecting to attend college to explore a TCAT or community college as well. **Meet with your cohort students during the campus visit and let them speak to your seniors about their college experiences.** |

**Relationships: Foster connections that strengthen students' postsecondary success.**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Mentoring<br>(Target: at least 25% of student population, specify data driven criteria) | X | | Ongoing | Sites must develop and implement a robust college-focused mentoring program to serve students. Mentoring may take many forms and sites may choose to implement various mentoring programs to meet the specific needs of the diverse populations they serve. Sites may target a subset of students for mentoring services (using data). Mentoring structures may include older students mentoring younger students, virtual mentoring programs, college students/alumni mentoring current students, or staff/community volunteers mentoring current students. Mentoring services should occur monthly at a minimum. Sites may use GEAR UP funds to hire a coordinator to manage the entire process. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| College and Career Planning Sessions<br>(target: 80% - 100% of student population) | X | | October 31, 2023 (For the larger GEAR UP TN high schools, if this date isn't practical, please work with your regional coordinator for an agreed upon date.) | College/Career Planning Sessions are one-on-one meetings between a GEAR UP TN student (or a very small group of students) and a trained adult--typically the GEAR UP TN site coordinator, liaison, mentor, or faculty member. On or before October 31, 2023, GEAR UP TN sites are responsible for conducting/coordinating at least one College Planning Session with each student. You will be provided with a college planning session form to guide the conversations.<br><br>The sessions will serve as the primary vehicle for each GEAR UP TN student to create a plan to accomplish the following milestones prior to high school graduation:<br>• Finalize postsecondary plan<br>• Submit at least one application to a college or university<br>• Submit at least one scholarship application<br>• Complete the FAFSA, if eligible<br><br>Students will be directed to appropriate GEAR UP TN services based on their individual goals and academic preparedness.<br>Students will be provided additional support, if identified as at-risk, based upon early warning indicators (attendance, course grades, etc.)<br><br>College Planning Sessions may be implemented as part of a comprehensive mentoring program. The GEAR UP TN Central Office will provide resources, CPS forms, and training to help facilitate College Planning Sessions. **Regional Coordinators will review College Planning Sessions and Transition Plans during site visits.** |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| College Success Visits/Workshops | | X | Ongoing | In partnership with the GEAR UP TN central office, each GEAR UP TN Collaborative will identify higher education institutions where a large concentration of students is anticipated to attend. Site coordinators will conduct student success visits and/or workshops at these campuses during the grant year. Theses visits will serve as wellness checks to encourage students to participate in on-campus activities, make use of campus resources, celebrate success, troubleshoot challenges, and connect with other GEAR UP TN students. Coordinators are encouraged to partner with other coordinators where there is an overlap of student populations to plan visits/workshops. |
| Monthly College Student Check-In | | X | Ongoing | In addition to planned college success visits, site coordinators will check-in with cohort college students on a monthly basis via text, phone, email, etc. Check-ins are designed to maintain student/site coordinator relationships and will allow coordinators an opportunity to identify and troubleshoot student challenges. Check-ins are designed to encourage student persistence through their first year of postsecondary education. The GEAR UP TN central office will provide a calendar of topics and a college student success guide to help guide student/site coordinator conversations. |
| Near Peer Mentoring | | X | Ongoing | Plan peer mentoring sessions where some of your cohort students that are attending different types of institutions will visit and speak to high school students during their breaks throughout the year. The GEAR UP TN Central Office will provide suggestions for topics and questions. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Two Parent/Guardian/ Family services - Raise Awareness (Target: 60% of students' families) | X | | Both parent events should occur in the fall.  The deadline for the first event is September 30, 2023. The first event should focus on transition.  The second event should occur on or before October 31, 2023. | Sites will implement two parent/guardian/family services. The focus of the first workshop should be the transition from high school to college. Plan to review the new Parent Guide to Transition for this workshop.  The second workshop will focus on financial literacy and the financial aid process.  In person meetings are preferred.  However, virtual options may be utilized. |

**Reinforce Action: Assist students in completing critical steps of the college-going process.**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Senior Next Guides (Target: 90% - 100% of student population) | X | | All items completed by May 31, 2024 | The Senior Next Guide is a comprehensive workbook designed to help GEAR UP TN students create a plan to accomplish the following milestones during their senior year:<br>• Decide upon a postsecondary plan<br>• Decide upon a career or career interest area<br>• Submit at least one application to a college or university<br>• Submit at least one scholarship application<br>• Complete the FAFSA, if eligible<br>• Receive appropriate GEAR UP TN support services based on individual goals and academic preparedness<br><br>The Next Guide services can be implemented through a series of comprehensive activities done in senior classes, workshops, 1-1, small group meetings, or at home. The GEAR UP TN Central Office will provide resources, forms, and training to help facilitate the Senior Next Guide implementation. |
| Text Messaging (target: 80% - 100% of student population) | X | X | Usage is ongoing – Registration by August 31, 2023 | Site coordinators will have access to a text messaging platform, Signal Vine, to be used with 12th grade GEAR UP TN students and the cohort. It is also encouraged to register the parents of seniors and cohort students to receive text messages. The GEAR UP TN Central Office will send out strategic text messages that correspond to important college-going milestones. Site coordinators are responsible for monitoring and responding to text responses via Signal Vine in a timely manner. Site Coordinators are encouraged to use Signal Vine on a regular basis for their communications to GU students as this will prepare students for this process in college. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| TN Promise Application Workshop (90 – 100 % by October 31) | X | X | November 1, 2023 | Every eligible senior should have the opportunity and support to complete a TN Promise Application. The GEAR UP TN Central Office will provide resources to assist in the planning and implementation of TN Promise Application resources. **It is expected that a good faith effort is made for every eligible senior student to submit a TN Promise application.** The GEAR UP TN Central Office will also provide student application tracking data. We have found that a best practice for this requirement is to set aside a specific time during a school day(s) to complete this requirement. In partnership with your high school administration and counseling staff, designate a **TN Promise Application Week between August 1 – September 15th** where you will focus on TN Promise applications with a goal of 90 % of all eligible seniors completed during this week. |
| TN Promise Community Service Opportunity | X | X | May 31, 2024 | Site coordinators are asked to communicate at least one opportunity for students to complete their TN Promise community service requirement for Spring 2023. Site coordinators are encouraged, but not required, to coordinate a volunteer opportunity for senior Tennessee Promise students. |

**Reinforce Action: Assist students in completing critical steps of the college-going process.**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| TN FAFSA Frenzy / One-on-one FAFSA Completion | X | X | March 1, 2024 | TN FAFSA Frenzy is a service or series of services designed to provide opportunity and support for all students to complete a FAFSA (Free Application for Federal Student Aid). **It is expected that a good faith effort is made for every eligible senior student to submit a FAFSA.** The GEAR UP TN Central Office will provide resources to assist in the planning, implementation, and data tracking of FAFSA completion. Please register to receive TN FAFSA Frenzy resources via Tennessee's Path to College Event registration by August 01, 2022. FAFSA submission and completions should be included in the student transition plans. Transition Plans will be reviewed and approved by the Regional Coordinators. **Invite the cohort students and families to your high school FAFSA completion events as well as your seniors.** |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| College Application and Exploration Week<br>(target: 80% - 100% of student population) | X | | September 1 – 30, 2023 | College Application and Exploration Month is a statewide event designed to build excitement around the college application and college-going process. High schools participating in College Application and Exploration Month should designate a week to celebrate College Application and Exploration.  Sites should identify specific dates, times, and space during the school day for seniors to complete at least one application for admission while receiving the encouragement and assistance of school, college, and community volunteers. Activities may include college admissions visits, college spirit days, workshops, college door decorating contests, etc. Regional Coordinators will work with sites to devise College Application and Exploration Week plans. **It is expected that a good faith effort is made for every senior student to apply to at least one postsecondary institution during this week.  College App week activities are required; however, there is flexibility in which week the required activities take place.** Please make certain that your College App week is during a favorable time to ensure school and community buy-in. This may also be combined with TN Promise completion for the seniors. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| College Signing Day (target: 80% - 100% of student population) | X | | May 31, 2024 | College Signing Days are simple ways to celebrate students, their accomplishments, and their futures. During a College Signing Day, graduating seniors publicly announce the college they have chosen to attend in front of families, supporters, and the entire student body. This is one of the Path to College Events. GEAR UP TN Central Office will provide resources to assist in the planning and implementation of College Signing Days. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| High School/College Transition (target: 90% - 100% of student population) | X | | May 31, 2024<br>Ongoing | Site coordinators are asked to **host a series of college transition activities/workshops** for 12th grade students. **This required service is not a single one-time activity or event. Transition should be ongoing and different for students based on postsecondary selections. Transition plans for a 4-year university/college, community college and TCAT will all be very different.** Content of the transition activities/workshops will focus on student success skills, such as study skills and time management, as well as college knowledge such as the function of offices like the bursar and registrar. **It is necessary to offer multiple college transition workshops for the different types of postsecondary institution that your students will attend. Below are some guidelines to use when planning transition workshops and/or events.**<br>• Every student (regardless of their plans after high school) should have a written transition plan to include next steps, key contacts, and general advice<br>• Transition should not only include enrollment but the steps that they need to take to be successful for their first year of college, the military, or in a new job<br>• Transition should be individualized for each student based upon their personality, interests, aptitude, goals, skills, and abilities<br>• Break students into small groups for transition workshops as appropriate (ex: students that want to go into welding at a TCAT, nursing at the University of Memphis, or education at Vol State. |

**Educator Professional Development**

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| GEAR UP TN Educator Orientation (100% of school staff that serves seniors) | X | | September 1, 2023 | Site coordinators and GEAR UP TN Central Office staff will jointly provide a GEAR UP TN orientation for 100% of school staff serving seniors. The GEAR UP TN Central Office will prepare a PPT template for the orientation. Site coordinators will provide an orientation to teachers who are absent from the initial teacher in-service and for any new teachers hired after the start of school. This orientation will provide an overview of the GEAR UP TN project and the services that the project provides. The orientation should focus on the role every faculty member plays in increasing the number of students who access and succeed in higher education. |
| Two Pre-Approved Professional Development Activities for Educators | X | | September 15, 2023 – College Transition Workshop<br><br>December 31, 2023 – Financial Literacy and Financial Aid Processes | Site coordinators are asked to conduct a **College Transition Workshop** and **Financial Literacy Workshop** to meet the two Educator Professional Development requirements. The GEAR UP TN Central Office will provide resources for these workshops.<br>The first workshop should focus on **College Transition and Transition Plans.** The purpose of the **College Transition Workshop** is to provide all educators and administrators who work directly with students a brief summary of college transition and summer melt information relevant to postsecondary institutions where students from your high school enroll.  Workshop must include transition information about a 4-year university/college, TCAT, and a community college.  Feel free to invite college representatives to help with this requirement.<br>The **Financial Literacy and Financial Aid Processes Workshop** should consist of teachers, counselors, administrators, and volunteers who will be instrumental in assisting students and parents with all components of the financial aid process. Additional PD can be implemented based upon the academic/college-readiness and needs of students and educators. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Regional Site Coordinator Meetings | | | Ongoing | GEAR UP TN Central Office staff will convene site coordinators on a regular basis to share best practices, report on grant implementation, and discuss opportunities for collaboration among sites. **These meetings are mandatory for all site coordinators.** Some of these meetings will be virtual using Teams or WebEx. |
| Completion of Monthly Activity Plan (MAP), (CAR), Compass data, Reimbursement Request, match, and Over $1000/$5000 Purchase Requests | | | 10th of each month

15th of Each Month | GEAR UP TN sites will complete and submit the following:

**10th of each month** – Completed Activity Report (CAR) and the Compass CAR

**15th of each month** – Monthly Activity Plan (MAP), reimbursement requests,

Match documentation and any Over $1000 or $5000 Purchase Requests. Additionally, all COMPASS entries for the prior month must be entered by the 10th of each month. |
| Two College Access Steering Committee meetings | | | Fall 2023 and Spring 2024 | The College Access Steering Committee meetings should focus on developing project sustainability, resource development, building new partnerships, and expanding a college- going culture in direct-service schools. The GU Central Office will provide a template and data reports for each meeting. **Steering Committee meetings should be listed on your MAP the month prior to the meeting. Also, a copy of the meeting agenda should be sent to Regional Coordinator at least two weeks prior to the meeting date. Ask a cohort student(s) to briefly speak at each meeting about their college experiences and college readiness.** |
| Establish the College Access Steering Committee | | | September 30, 2023 | Please provide your College Access Steering Committee roster to your regional coordinator. A template will be provided by your regional coordinator. Your regional coordinator should be a member of your College Access Steering Committee. **Add a cohort student to your steering committee.** |
| Update District Contact | | | September 1, 2023 | Please provide any changes in district administration to your regional coordinator. A template will be provided by your regional coordinator. |

| Minimum Grant Services | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Newsletter (Target: 80% - 100% of student population) | X | X | Two newsletters will be sent during Year 6. The first should be sent before September 15th and the last newsletter should be sent on or before April 30. | GEAR UP TN has purchased the product Smore for your use in creating easy, professional looking newsletters. Collaboratives are encouraged to use Smore or a similar program when creating newsletters. Smore Templates will be provided by the Central Office for your use.  Each issue of the newsletter should focus on building college aspiration, college knowledge, and developing college-going identities for GEAR UP students.  Newsletters can be something created solely for GEAR UP or they can be created in partnership with the counseling office or administration, but newsletters must focus on GEAR UP TN goals and objectives. Additional topics may include student success strategies; transitioning to college, summer melt, parent involvement and support; FAQs, upcoming GEAR UP TN events and dates; highlights of recent GEAR UP TN services or successes; information about a specific major, career area, or higher education institution; etc.  Newsletter drafts should be submitted for review to Jessie Greene at least one week before printing, posting, or sending. Refer to the Implementation Guide for guidance outlining what counts as a parent or student contact regarding newsletters. |
| Senior Next Guide Distribution – 100% of student population. | X | | September 15, 2023 | Site Coordinators will have Senior Next Guides distributed to 100% of cohort on or before September 15, 2023. |
| GEAR UP TN Welcome Packet (Target:  100% of student | X | X | August 31, 2023 | Each site will arrange for the mailing of an introduction/welcome to GEAR UP TN packet to parents.  Packet content and templates will be provided by GEAR UP TN Central Office. |
| 21st Century Scholar Certificate (Target:  100% of student population | X | | May 31, 2024 | As required by Federal GEAR UP requirements, all GEAR UP TN students must receive a 21st Century Scholar Certificate. The 21st Century Scholar Certificate, provided by the GEAR UP TN Central Office, will include a summary of Federal and State financial aid that may be available to students. **Only students who have not previously received a certificate should receive one**. Ideally, these should be given out to new students at the beginning of each semester and then to any new student when they arrive. All documentation pertaining to the 21st Century Scholar Certificates must be kept in the Documentation Notebook and added into Compass. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Transition Plan | X | | March 1, 2024 Ongoing | Each Collaborative will submit their Transition Plan to their regional coordinator for the following year. Transition Plans should include plans for transition to a 4-year |
| Update Sustainability | | | May 15, 2024 | Each Collaborative will submit their sustainability plan to their regional coordinator. This should focus on what will be sustained for the current grade. level. |
| Updating Spending and Match Plan | | | February 15, 2024 Ongoing | Each Collaborative is responsible for submitting and monitoring their spending and match monthly. By February 15, 2024, each site must submit a spending plan and a match plan that will show their intentions through the end of the grant year. These will need to be submitted to your regional coordinator for approval. |
| Travel to the mandatory GEAR UP TN Kickoff meeting | | | Summer 2023 | **Project directors and site coordinators from each Collaborative are required to attend the kickoff meeting.** Additional attendees such as a director of schools, principal, or secondary school supervisor can be invited. Topics covered will include college access professional development, data collection, fiscal policies, and general GU TN policies and procedures. |
| Professional development offered by the GEAR UP TN Central Office | | | Dates to Be Determined | During Year 6, the GEAR UP TN Central Office plans to offer professional development opportunities via webinar and in-person. Please budget travel expenses for the site coordinator and at least one additional Collaborative representative to attend two separate day-long professional development sessions. |
| Collect and/or update senior student cell phone numbers (80% - 100% of student population) | X | X | May 15, 2023 and August 31, 2023 | Collect cell phone numbers from rising senior students to be used in text communications throughout the next school year and update the cell phone numbers for the cohort. This list should originally be submitted by May 15, 2023 and updated by August 31, 2023. |

| Minimum Grant Services Per School | 12th | Cohort | COMPLETION DEADLINE | Comments and Clarifications |
|---|---|---|---|---|
| Data submission | | | Ongoing | Submit required data as requested by the GEAR UP TN Central Office. Requests will include but are not limited to service delivery data, transcript data, and teacher/parent rosters. |
| Documentation Review | | | Ongoing | Proper documentation in Compass, MAPS/CARS, and your documentation notebook is necessary and required as part of this state grant that uses federal dollars. The documentation for events and services should be consistent across all of these. To ensure compliance with this requirement, the GEAR UP TN Central Office will conduct monthly CAR audits and the regional coordinators will review your documentation notebooks at least once each semester. (Fall/Spring) **This will include your documentation notebook for contacts with your cohort.** |
| One Programmatic Site Visit | | | May 31, 2024 | A site visit will be scheduled by the GEAR UP TN Central Office staff to discuss Year 6 implementation and a final grant review. Attendees should include the director of schools (or designee), the project director, site coordinator(s), relevant GEAR UP TN staff, and others as needed. (This activity does not need to be on your work plan.) |
| One Fiscal Site Visit | | | May 31, 2024 | A site visit scheduled by the THEC internal auditor to review grant financial records. (This activity does not need to be on your work plan.) |

## _APPENDIX B: GEAR UP TN SERVICE DEFINITIONS_

**Student Services**
**Tutoring/ homework assistance**
- Tutoring provides additional academic instruction outside the classroom designed to increase the academic achievement of students that can occur one-on-one or in small groups before school, after school, during study or lunch breaks, or on weekends. Tutoring should be provided by GEAR UP TN staff, hired tutors, teachers, and/or volunteers. Tutoring should be entered into the GEAR UP TN data system by subject area.
- Homework assistance services assist students in completing homework and/or make-up work due to absences.

**Comprehensive mentoring**
- Comprehensive mentoring services are one-on-one, long-term, structured relationships that pair an identified academically and/or emotionally at-risk student with an older student or adult (typically one hour per week) either during or after the school day. This type of comprehensive mentoring is long term and can include academic, social, organizational, life skills, or college access elements.

**Financial aid counseling/advising**
- Financial aid counseling/advising services provide assistance to students to understand and navigate the complexities of financial aid, including providing hands-on assistance with the FAFSA and scholarship applications, financial aid or literacy presentations, financial aid or literacy curricula, and participation in college savings plans.

**Counseling/ advising/academic planning/career counseling**
- Behavioral counseling: meeting with students one-on-one or in small groups to discuss personal growth issues such as decision making, goal setting, behavior concerns, family issues, or home visits.
- College Advising: providing assistance to students on college choices or college planning.
- Academic planning: providing individual or small group assistance to students on course selection, course of study choices, college major selection, assessment advising (EXPLORE, PLAN, ACT, PSAT, or SAT), interpretation of scores, or assistance with placement tests.
- Career counseling: providing individual or small group assistance to students about career choices, career planning, internships, or career interests.

**College visit/college student shadowing**
- College visits: a physical visit to a college campus by a student which should include an official tour, presentation(s) by admissions, academic departments, athletics, student affairs, residence life, multicultural affairs, or other college departments.
- Virtual college visit: a virtual college tour by a student via remote access including the internet, webinar, etc. Virtual college visits must be supervised/ led by a teacher or other GEAR UP TN staff.
- College student shadowing: a one-on-one experience in which a middle or high school student spends a day on a college campus with an undergraduate student seeing college life for a typical undergraduate.

**Job visit/job shadowing**
- Job site visits include visits to local businesses, employers, and agencies in which students learn the benefits of specific jobs or careers and the skills and education requirements needed. Job site visits expose students to the workplace while reinforcing the link between education and careers.
- Job shadowing: A one-on-one experience in which a student spends time at a work place with an employee, observing and learning about career professions. Job shadowing can follow a job site visit.

**Summer programs**
- Summer programs include any GEAR UP TN enrichment program held during the summer. Summer programs may include the GEAR UP TN Youth Summit, college visits, academic enrichment, credit recovery programs, or other college preparatory programs.

**Educational field trips**
- Educational field trips include an activity that occurs when students leave their school or travel to another location that includes an academic component and is linked to classroom activities and enhances the existing curriculum in key content areas such as math, science, or language arts.

**Workshops**
- Workshops are group presentations or informational sessions aligned with GEAR UP TN goals and objectives. Examples include workshops about financial aid, kick-off events, assemblies, or awareness events about the benefits of college.

**Family Services**
**Workshops on college preparation/ financial aid**
- Workshops for families should be aligned with GEAR UP TN goals and objectives. Examples include classes about financial aid, college choice, financial literacy, and programs about the benefits of college.

**Counseling/advising**
- Counseling: GEAR UP TN school staff or counselors meet with families with or without students to discuss personal growth areas that may present potential barriers to enrolling and succeeding in college. These areas may include academic goals, college plans, school progress, life skills, etc.
- Advising: GEAR UP TN or counselors meet with families with or without students to discuss college choices, coursework, college planning, or financial aid planning.

**College visits**
- A physical visit to a college campus which should include an official tour, presentation(s) by admissions, academic departments, athletics, student affairs, residence life, multicultural affairs, or other college departments. Family members can also attend college visits as a group chaperone.

**Family events**
- Often held during the evening, family events are to encourage family engagement in students' progress toward success in postsecondary education. Family events include parent nights and might take place in a church or community center.

**<u>Professional Development for Educators</u>**
**Conferences**
Conferences, including NCCEP or the Tennessee College Access and Success Conference, that directly support the three goals of the GEAR UP program outlined by the US Department of Education or assist in meeting the GEAR UP TN objectives.

**Training/workshops**
- Trainings provided by GEAR UP TN may include technology, curricular, ACT, financial literacy or common core professional development. Trainings directly support the three goals of the GEAR UP program outlined by the US Department of Education that assist in meeting the goals and objectives set by GEAR UP TN.

**Meetings**
- Meeting with teachers might include an orientation to GEAR UP TN, sharing of information such as best practices or student achievement data, or other topics that directly support the three goals of the GEAR UP program outlined by the US Department of Education that assist in meeting the goals and objectives set by GEAR UP TN.

## APPENDIX C: GEAR UP TN FRAMEWORK, STRATEGIES, AND PERFORMANCE MEASURES

| |
|---|
| **Rigor:** Academically prepare all students for postsecondary education through rigorous curriculum and academic support. |
| *Strategy 1: Ensure all students have necessary academic content knowledge and supports for success in postsecondary education.* |
| *Strategy 2: Ensure all students have equitable access to rigorous course opportunities, especially early postsecondary opportunities.* |
| Metric 1.1: Increase the % of GU students who pass Pre-algebra by the end of the 8th grade |
| Metric 1.2: Increase the % of GU students who pass Algebra 1 by the end of the 9th grade |
| Metric 1.3: Increase the % of GU students who take two years of math beyond Algebra 1 by the 12th grade |
| Metric 1.4: Increase the % of GU students who demonstrate proficiency on state assessments in math and English |
| Metric 1.5: Increase the % of GU students who take at least one EPSO, such as dual enrollment or AP coursework |
| Metric 1.6: Increase the % of GU students who place into college level math and English without the need for remediation |
| Metric 1.7: Increase the % of GU students who achieve a 21 or higher on the ACT and qualify for the state's lottery scholarship |
| **Reach Higher**: Increase the number of GEAR UP schools with a strong college-going culture. |
| *Strategy 1: Create college-going identities among students.* |
| *Strategy 2: Create a schoolwide college-going culture and foster collective responsibility for the postsecondary preparedness and transition of all students.* |
| Metric 2.1: Increase the % of GU students who will report that teachers expect them to go to college |
| Metric 2.2: Increase the average daily attendance rate among GU students |
| Metric 2.3: Increase the % of GU students who are on track for graduation at the end of each grade |
| **Relevance**: Increase GU students' ability to connect career goals with educational requirements |
| *Strategy 1: Provide students with progressively meaningful career experiences moving from awareness to immersion.* |
| Metric 3.1: Increase the % of students who report that they understand the education requirements necessary to achieve their career goals |
| **Relationships**: Increase the number of GU students who have meaningful relationships that foster academic and postsecondary success |
| *Strategy 1: Draw on the power of peers to encourage collective postsecondary aspiration and going.* |
| *Strategy 2: Engage families in college preparation opportunities.* |
| *Strategy 3: Provide opportunities for every student to develop positive mentoring relationships.* |
| Metric 4.1: Increase the % of GU family members who actively engage in activities associated with assisting students in their academic preparation |
| Metric 4.2: Increase the % of GU students who report having at least one trusting relationship with an educator |
| **Raise Awareness**: Increase GU students' and their families' knowledge of postsecondary education options, preparation, and financing |

| |
|---|
| *Strategy 1: Communicate with students and their families about postsecondary and career options early and often.* |
| *Strategy 2: Demystify the process of applying and paying for postsecondary education.* |
| Metric 5.1: Increase the % of GU students who are on-track to apply for college, measured by completion of the ACT/SAT |
| Metric 5.2: Increase the % of GU students who report that they expect to obtain a postsecondary credential |
| **Reinforce Action**: Increase the rate of high school graduation and postsecondary enrollment of GU students |
| Metric 6.1: Increase the % of GU students who submit a Tennessee Promise application |
| Metric 6.2: Increase the % of GU students who submit a FAFSA |
| Metric 6.3: Increase the % of GU students who graduate from high school |
| Metric 6.4: Increase the % of GU students who enroll in postsecondary education |

## APPENDIX D: GEAR UP TN PRE-APPROVED INCENTIVES AND COST LIMITS

**GEAR UP TN PROGRAM**
**SPECIFIC ALLOWABLE COSTS AND GUIDELINES**

The rate tables and guidelines outlined in Appendix D are subject to approval from the U.S. Department of Education.

**Site Coordinator Salary**
The annual salary and benefits (total compensation) for any one GEAR UP TN Site Coordinator may not exceed $80,000 using GEAR UP funds. Any amount in excess must be paid from a non-GEAR UP source. These additional expenditures may be reported as match if this source is non-federal.

| Allowable Incentives | | |
|---|---|---|
| Description | Amount | Purpose |
| Drawing item: NO gift cards purchased with GEAR UP funds. | One item per meeting valued at up to $25. | Attendance incentive for family events. |
| Clothing items w/GEAR UP TN or college message. Any printing/setup charges must be included. | Up to $20 each. | Students, staff, chaperones to wear for field trips, school events, special programs, community service and other events to promote GEAR UP TN teamwork, and safety. |
| Pencils/pens. | Up to $1 each. | Student reward or incentive. |
| Stickers. | Up to $0.50 each. | Student reward or incentive. |
| Backpacks. | Up to $20 each. | Incentive for academic achievement, attendance, or service. |
| School Supplies (binders, folders, paper, bookmarks, highlighters, lanyards, markers, calculators, and other school supplies). | Up to $20 per student per year. | Student reward or incentive. |
| Coffee mugs. | Up to $7 each. | Appreciation tokens for volunteers. |
| Hats, scarves, bags w/GEAR UP TN or college message. | Up to $12 each. | Student reward or incentive. |
| Career or educational books. | Up to $20 each. | Student reward or incentive. |
| Educational CD's. | Up to $20 each. | Student reward or incentive. |
| Educational DVD's. | Up to $20 each. | Student reward or incentive. |
| Decorations for events (flowers, centerpieces, balloons). | Up to $100 per event. | For GEAR UP TN events only. |
| Candy. | Up to $1 each. | Student reward or incentive. |
| Educational games. | Up to $20 each. | Student reward or incentive. |
| Flash drives. | Up to $10 each. | Student reward or incentive. |

**(Purchases of music are considered entertainment and therefore not allowed.) NOTE: The reward/incentive budget shall be no more than 2% of contractor's total budget each contract year.**

Food and beverages may be offered to participants **only** in conjunction with GEAR UP TN training, workshops, services, and structured activities where the participants are receiving GEAR UP TN information.  Use the following guidelines when planning to provide food for a GEAR UP TN event.

| Meal, Beverage, and Snack Allowance | | |
|---|---|---|
| Description | Amount | Purpose |
| Meals | Up to $12 per student, parent, or staff. | Family/Parent Night Event |
| Meals | Up to $12 per student per meal. | Field trips, college visits or test taking |
| Healthy and nutritious snacks (e.g. granola bars, string cheese, fruit, popcorn, trail mix, pretzels, crackers, milk, juice, yogurt, bagels, muffins) | Up to $4 per day per student. | Field trips, college visits, after-school programs |
| Coffee and light refreshments or light meals (e.g. fruit, bagels, donuts, muffins, cookies, or crackers and cheese) | Up to $5 per person per event. | Advisory meetings, volunteer meetings, chaperone meetings |

GEAR UP TN allows expenses related to dual credit options, credit recovery, student camps and placement tests. Use the following guidelines when planning for these expenses.

| Student Classes, Camps, College Credit | | |
|---|---|---|
| Description | Amount | Purpose |
| College classes, online classes for credit retrieval, AP test costs or similar expenses. | Allowable. | Activities associated with academic college credit |
| Individual student camps, on a college campus. | Request Pre-Approval. | Academic support or enrichment |
| SAT or ACT tests | Published amount and allowable only if student is not eligible for a waiver. | Pre-College Tests |
| College Placement Tests (Compass, etc.) | Published amount when no waiver is available. | Placement Tests |

**Indirect Costs**

Consistent with section 76.563 – 76.569 of EDGAR, all grant recipients are limited to a **maximum indirect cost rate of eight percent of a modified total direct cost base or the amount permitted by its negotiated restricted indirect cost rate agreement**, **whichever is less**. This rule applies to grantees under programs with a statutory requirement prohibiting the use of Federal funds to supplant non-Federal funds, and to the subgrantees under these programs.  GEAR UP legislation contains a requirement prohibiting the use of GEAR UP funds for supplanting. As outlined in section 76.564 of EDGAR, therefore, Collaboratives must use the restricted indirect cost rate when developing their budget.

**Writing tip:**  The rates below are as of FY 2022 and were provided by the Tennessee Department of Education. Please confirm your Indirect Cost rate with your district's fiscal office and notify Durice Wallace, GEAR UP TN Fiscal Manager, if the indirect rate has changed.

Restricted Indirect Cost Rate for GEAR UP TN funded Collaboratives:

| School System | Restricted Rate |
|---|---|
| Anderson County | 5.32 |
| Bradley County | 2.13 |
| Campbell County | 3.08 |
| Davidson County | 6.45 |
| Fayette County | 4.35 |
| Fayetteville City | 6.81 |
| Haywood County | 3.03 |
| Henry County | 3.07 |
| Jackson County | 3.39 |
| Johnson County | 3.91 |
| Meigs County | 2.88 |
| Overton County | 2.40 |
| Polk County | 3.27 |
| Robertson County | 1.85 |
| Shelby County | 3.87 |

## _APPENDIX E: WORK PLAN GUIDANCE AND EXAMPLES_

Remember your work plan is a comprehensive planning document that should be detailed and easily understood. Below are a few pointers to consider:

- A separate School Work Plan is required for **every** school. The Collaborative Work Plan is for the entire collaborative.

- Make sure that you are meeting the Minimum Required Services that you were previously given.

- **NCCEP Conference Budget** - $3000 per person for the NCCEP Conference in July. We expect that most sites will be sending the Project Director and Site Coordinator only. Please provide justification for additional staff.

- **Food** - Providing food on college or job site visits is optional. We recognize that some college visits allow you to make it back to school by lunch time or make other arrangements. This also may be a good opportunity to partner with local businesses.

- **Payment** - Paying teachers and school employees for tutoring, counseling, and attending trips, is only allowable during times that they are **not** being paid as regular school employees.

- **Professional Development** - Expenses for professional development and training over $2000 will be approved for software or license fees when they will support the cohort for many years or for training over an extended period of time.

- **Speakers** - Expenses for motivational speakers and trainers over $2000 will only be approved if you can show that there is a long-term commitment with follow-up by the vendor.

- **Equipment -** When planning costly equipment purchases, think carefully about whether this is the best use of GEAR UP funds to serve your students. How will the equipment be used? How will the educators be trained to use it and how will it be worked into the work plans and activities? Will the equipment move with the cohort group that it is intended to serve? How will the equipment be secured and maintained?

- **Recreational Expenses** - Expenses for entertainment, recreation or cultural activities are **not** allowable.

- **Accessibility of Services** - Services required for a certain grade level, should be **available** (not necessarily used) by all students in that grade (i.e. college visit, job site visit, tutoring, and mentoring).

## *APPENDIX F: GRANT MATCH RESOURCES*

**Grant Match**

In an effort to build project sustainability, GEAR UP TN grantees are required to match 100 percent of the annual grant amount in year six of implementation. Matching dollars can be contributed through actual dollars or eligible in-kind contributions and must support the project's goals and objectives. THEC will provide Collaboratives with technical assistance in meeting the grant match requirement.

**Match Definition**

"Match" is a general term that refers to items donated to the project using non-grant funds, regardless of who paid for them. In the case of GEAR UP TN grants, it means the non-federal share of program costs. If your organization purchased the goods or services but did not request reimbursement from the grant, then the generic term "match" applies.

"In-kind match" refers to non-cash contributions of goods or services made by third-party individuals or organizations to GEAR UP TN projects. Examples of in-kind match include work done by unpaid volunteers in support of GEAR UP TN, fee waivers, and donations of supplies, facilities, or equipment. Qualifying in-kind contributions must be necessary to accomplish program activities, verifiable, and only allowable if the grantee could legitimately pay for them using actual grant funds. In-kind match follows the same rules as the money you spend on GEAR UP TN. In-kind match must be allocable, allowable, and reasonable.

Below are examples of match documented from the grantees participating in Tennessee's existing GEAR UP TN project.

**Donated Time**
- Any portion of the site coordinator's salary or benefits not paid by the grant.
- Any portion of the project director, finance, IT, or data administrator's salary and benefits dedicated to grant implementation.
- Time that administrators or supervisors spend on GEAR UP TN initiatives.
- Time counselors or teachers dedicate to program initiatives outside of their normal workday.
- Time donated by volunteers.
- Time that college personnel spend with GEAR UP TN students or working on GEAR UP TN initiatives including college fairs, campus tours, and high school visits.
- Time that local or state employees spend with GEAR UP TN students or working on project initiatives.
- Time donated by college students, community members, or former high school students. Note that the current valuation of a volunteer's time in Tennessee is $26.02 per hour.

- Time donated by business leaders, employers, and employees for career fairs, workshops, job shadowing, and job site visits.
- Time donated by attendees at Steering Committee meetings.
- Time donated by mentors including tnAchieves, Peer Power, NAACP, Link Crew, the Ayers Foundation, and industry professionals.
- Professional development or motivational speakers that benefit GEAR UP and are donated or paid by someone else.
- Time donated by tutors that are not paid for by grant or other federal funds.
- Time donated for College Application and Exploration Week and similar events.

## Donations by Postsecondary Institutions

- Dual Enrollment tuition and fees paid by the postsecondary institutions.
- Donations by colleges, non-profits, businesses, or the school system.
- Application fees waived by colleges.
- Meals donated by colleges.
- Costs associated with a college and/or career fair that benefits GEAR UP TN students.
- Special programs and camps provided by colleges for GEAR UP TN students.
- Space donated by postsecondary institutions for GEAR UP TN events, services, or students.

## Donations by the School Systems

- Custodial expenses paid for by the school system for GEAR UP TN events, if above and beyond normal contractual arrangements.
- Transportation costs for GEAR UP TN events paid by the school system.
- Conference or training expenses that are not reimbursed by GEAR UP TN.
- Purchases by the school system that impact GEAR UP TN goals and objectives.
- Supplies donated by the district for the purpose of GEAR UP TN.
- Postage donated by the school system for the purpose of GEAR UP TN.
- Space, utilities, internet service, phone, insurance, etc. paid by the school system for GEAR UP TN events, services, and staff.
- Equipment or supplies that belong to the school system used by GEAR UP TN.
- Mileage that is not claimed for reimbursement.

## Summer Programs

Summer program expenses provided by the school system, local college, or non-profit including space, volunteers, etc.

## APPENDIX G: BUDGET LINE-ITEM DEFINITIONS

**Line 1     Salaries and Wages**
On this line, enter compensation, fees, salaries, and wages paid to site coordinators, project directors, and/or other staff paid using GEAR UP funds.  An attached schedule may be required showing client wages included in the aggregations.

**Line 2     Employee Benefits & Payroll Taxes**
Enter (a) the organization's contributions to pension plans and to employee benefit programs such as health, life, and disability insurance; and (b) the organization's portion of payroll taxes such as social security and Medicare taxes and unemployment and workers' compensation insurance.  An attached schedule may be required showing client benefits and taxes included in the aggregations.

**Line 3     Total Personnel Expenses**
Add lines 1 and 2.

**Line 4     Professional Fees**
Enter the organization's fees to outside professionals, consultants, and personal-service contractors.  Include legal, accounting, and auditing fees.  An attached schedule may be required showing the details in the aggregation of professional fees.

**Line 5     Supplies**
Enter the organization's expenses for office supplies, housekeeping supplies, food and beverages, and other supplies.  An attached schedule may be required showing food expenses or other details included in the aggregations.

**Line 6     Telephone**
Enter the organization's expenses for telephones, cellular phones, beepers, telegram, fax, E-mail, telephone equipment maintenance, and other related expenses.

**Line 7     Postage and Shipping**
Enter the organization's expenses for postage, messenger services, overnight delivery, outside mailing service fees, freight and trucking, and maintenance of delivery and shipping vehicles. Include vehicle insurance here or on line 14.

**Line 8     Occupancy**
Enter the organization's expenses for use of office space and other facilities, heat, light, power, other utilities, outside janitorial services, mortgage interest, real estate taxes, and similar expenses.  Include property insurance here or on line 14.

**Line 9     Equipment Rental and Maintenance**
Enter the organization's expenses for renting and maintaining computers, copiers, postage meters, other office equipment, and other equipment, except for telephone, truck, and automobile expenses, reportable on lines 6, 7, and 11, respectively.

**Line 10    Printing and Publications**
Enter the organization's expenses for producing printed materials, purchasing books and publications, and buying subscriptions to publications.

**Line 11    Travel**
Enter the organization's expenses for travel, including transportation, meals and lodging, and per diem payments.  Include gas and oil, repairs, licenses and permits, and leasing costs for company vehicles.  Include travel expenses for meetings and conferences.  Include vehicle insurance here or on line 14.

**Line 12    Conferences and Meetings**
Enter the organization's expenses for conducting or attending meetings, conferences, and conventions.   Include rental of facilities, speakers' fees and expenses, printed materials, and registration fees (but not travel).

**Line 13    Interest**
Enter the organization's interest expense for loans and capital leases on equipment, trucks and automobiles, and other notes and loans.  Do not include mortgage interest reportable on line 8.

**Line 14    Insurance**
Enter the organization's expenses for liability insurance, fidelity bonds, and other insurance.  Do not include employee-related insurance reportable on line 2.  Do not include property and vehicle insurance if reported on lines 7, 8, or 11.

**Line 15    Grants and Awards**
Enter the organization's awards, grants, subsidies, and other pass-through expenditures to individuals and to other organizations.  Include allocations to affiliated organizations.  Include in-kind grants to individuals and organizations.   Include scholarships, tuition payments, travel allowances, and equipment allowances to clients and individual beneficiaries.

Pass-through funds are not included when computing administrative expenses reported on Line 22.

**Line 16    Specific Assistance to Individuals**
Enter the organization's direct payment of expenses of clients, patients, and individual beneficiaries.  Include such expenses as medicines, medical and dental fees, children's board, food and homemaker services, clothing, transportation, insurance coverage, and wage supplements.

**Line 17    Depreciation**
Enter the expenses the organization records for depreciation of equipment, buildings, leasehold improvements, and other depreciable fixed assets.

**Line 18    Other Non-personnel Expenses**

NOTE: Expenses reportable on lines 1 through 17 should not be reported in an additional expense category on line 18. A description should be attached for each additional category entered on line 18. The contracting state agency may determine these requirements.

**Line 19     Total Non-personnel Expenses**
Add lines 4 through
18.

**Line 20     Reimbursable Capital Purchases**

Enter the organization's purchases of fixed assets. Include land, equipment, buildings, leasehold improvements, and other fixed assets. An attached schedule may be required showing the details for each such purchase.

**Line 21     Total Direct Program Expenses**
Add lines 3, 19, and 20.
Includes direct and allocated direct program expenses.

**Line 22     Administrative Expenses**
The distribution will be made in accordance with an allocation plan approved by your cognizant state agency.

**Line 23     Total Direct and Administrative Expenses**
Line 23 is the total of Line 21, Total Direct Program Expenses, and Line 22, Administrative Expenses. Line 23, Total Direct and Administrative Expenses Year-to-Date should agree with the Total of Column B, Year-to-Date Actual Expenditures of the *Invoice for Reimbursement* - (see Exhibit 2).

**Line 24     In-kind Expenses**
In-kind Expenses (Line 24) is for reporting the value of contributed resources applied to the program. Approval and reporting guidelines for in-kind contributions will be specified by those contracting state agencies who allow their use toward earning grant funds.

**Line 25     Total Expenses**
The sum of Line 23, Total Direct and Administrative Expenses, and Line 24, In-kind Expenses, goes on this line.