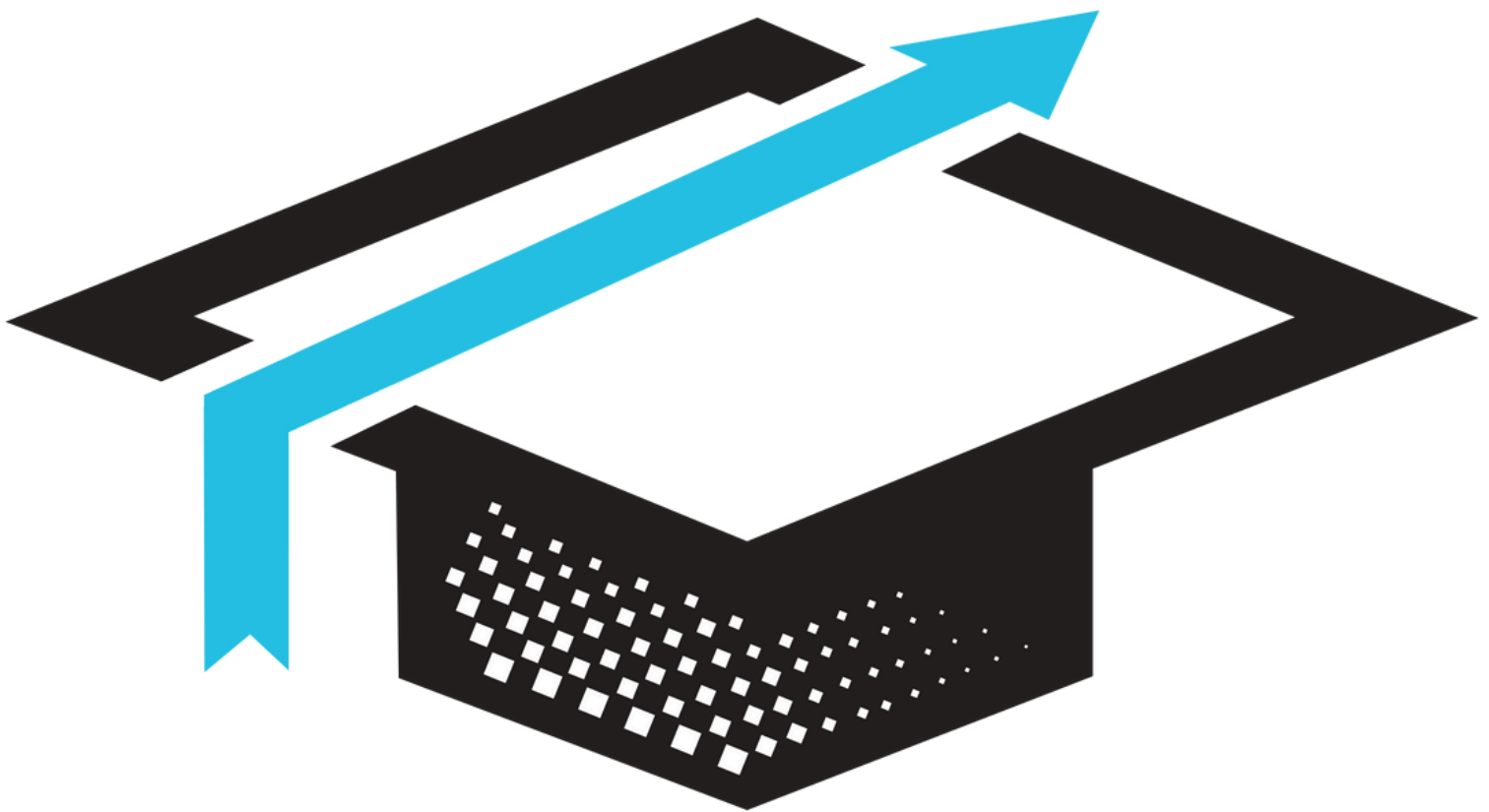


# **GEAR UP VIRGINIA**

## **POLICIES AND PROCEDURES MANUAL**



*This Policies and Procedures Manual is a living document. The information included in this document is derived from federal program regulation language. Some of the information is based on preliminary guidance from the U.S. Department of Education and is subject to change. GEAR UP Virginia will keep you informed about updates in regulation.*

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# **SECTION 1:**

# **PROGRAM INFORMATION**

### 2024-2025 Program Calendar

Date	Event
<b>September</b>	
Sept. 1, 2024	Start of 2024-2025 program year
Sept. 16, 2024	FINAL Reimbursement & Match due for 2023-2024 program year
Sept. 23-27, 2024	National GEAR UP Week
Sept. 30, 2024	Summative Report for 2023-2024 school year due
Sept. 30 - Oct 1, 2024	State Partner Meeting - Richmond, VA
<b>October</b>	
Oct. 12, 2024	Tidewater Community College tour for students with disabilities
Oct. 18, 2024	Student rosters due
<b>November</b>	
Nov. 14, 2024	1st Reimbursement due for 2024-2025 program year
Nov. 18, 2024	Parent and Student Surveys due
<b>December</b>	
December 11-13, 2024	Virginia College Access Network Conference, Williamsburg, VA (optional)
<b>January</b>	
Jan. 15, 2025	2nd Reimbursement and Match due for 2024-2025 program year
<b>February</b>	
Feb. 2-6, 2025	Virtual National GEAR UP Academy (optional)
Feb. 25, 2025	Regional Meeting (Cherrelle's Region) - Roanoke College
Feb. 26, 2025	Regional Meeting (Sarah Beth's Region) - Virginia Tech Center Richmond
Feb. 27, 2025	Regional Meeting (Jamie's Region) - Virginia Wesleyan University
<b>March</b>	
Mar. 14, 2025	3rd Reimbursement and Match due for 2024-2025 program year
Mar. 19, 2025	Longwood College tour for students with disabilities
Mar. 27, 2025	Virginia Commonwealth University tour for students with disabilities
<b>May</b>	
May 1, 2025	Draft Implementation Plan due to Regional Manager
May 15, 2025	4th Reimbursement and Match due for 2024-2025 program year
May 23, 2025	Final Implementation Plan due to Regional Manager
<b>June</b>	
Jun. 30, 2025	Implementation Plans due with signatures to Regional Manager
<b>July</b>	
Jul. 14, 2025	Final Budget Modification due for 2024-2025 program year
Jul. 15, 2025	5th Reimbursement and Match due for 2024-2025 program year
Jul. 20-23, 2025	NCCEP Annual Conference in San Francisco, CA (optional)
<b>August</b>	
August 31, 2025	End of 2024-2025 program year
<b>September</b>	
Sept. 15, 2025	FINAL Reimbursement & Match due for 2024-2025 program year

### Contact Information

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GEAR UP Virginia Fiscal and Administrative Specialist	✉ ☎
<b>Tierney Jackson</b> GEAR UP Virginia Scholarship Administrator	✉ GUVscholarship@schev.edu ☎ (804) 225-3778
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### Program Overview

**Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP)** is a federally funded college access grant program. GEAR UP was authorized by Title IV of the 1998 Amendments to the Higher Education Act of 1965. The purpose of GEAR UP is to increase the number of low-income and first-generation students who are prepared to enter and succeed in college. To meet this goal, legislation enables GEAR UP programs to provide:

- Financial assistance, academic support, counseling, mentoring, outreach and supportive services to secondary school students to reduce the risk of students dropping out of school or the need for remedial education at the postsecondary level.
- Information to students and their families about the advantages of postsecondary education and information about college financing options.

The U.S. Department of Education provides six or seven-year GEAR UP grants to states and partnerships to provide college access services at high-poverty middle and high schools. Partnerships consisting of one or more local education agencies and one or more higher education institutions and community organizations may apply for GEAR UP partnership grants. The governor of each state may designate only one agency to apply for and administer a GEAR UP state grant.

The U.S. Department of Education awarded a fourth GEAR UP state grant to the State Council of Higher Education for Virginia (SCHEV) beginning in the fall of 2021. In an effort to increase student college enrollment and success and to transform the lives of low-income families and their communities, GEAR UP Virginia (GUV) began offering college preparatory services and skills development to a cohort of 7th-grade students at 22 schools in 13 school divisions beginning in 2021. These GUV students will receive support through their first year of college, following high school graduation in 2027.

#### Project Goals and Objectives:

1. Increase the academic performance and preparation for post-secondary education of GEAR UP students;
2. Increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students
3. Increase GEAR UP students and their family's knowledge of postsecondary education options, preparation and financing.

**Activities and Services:** According to the Code of Federal Regulations, a grantee must provide comprehensive mentoring, outreach and supportive services to students participating in the GEAR UP program. These services must include the following activities:

1. Providing information regarding financial aid for postsecondary education to eligible participating students.
2. Encouraging student enrollment in rigorous and challenging curricula and coursework, in order to reduce the need for remedial coursework at the postsecondary level.
3. Implementing activities to improve the number of participating students who—
  - a. Obtain a secondary school diploma.
  - b. Complete applications for, and enroll in, a program of postsecondary education.
4. In the case of a State grantee that has not received a 100-percent waiver under section 404E(b)(2) of the HEA, providing scholarships in accordance with section 404E of the HEA.

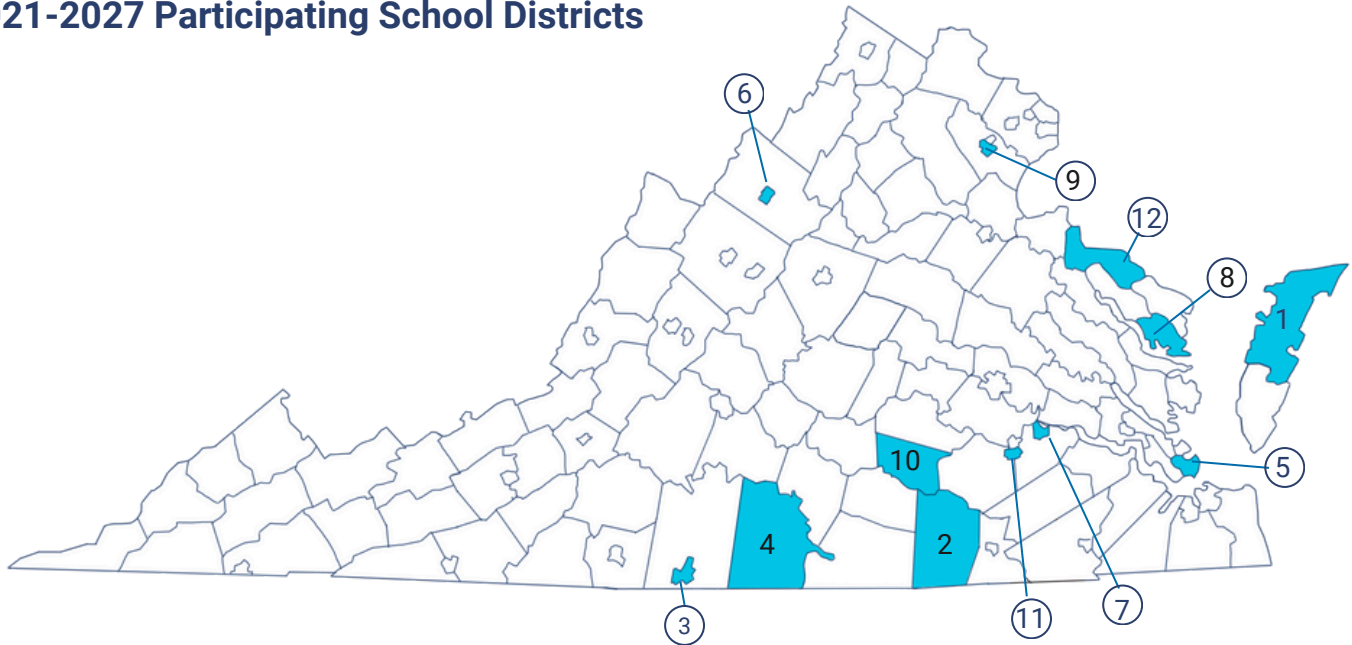
(Authority: 20 U.S.C. 1070a-24(a))

To meet these requirements, GUV services over a seven-year grant will include:

1. Tutoring and mentoring
2. Summer programs to promote transition to high school and, later, transition to college
3. Professional development for teachers in core academic areas
4. College and financial aid awareness workshops for students/parents
5. Visits to a variety of colleges
6. Counseling and advising related to college and career
7. Academic services in high school so that students do not need remediation in college
8. Outreach to help high school graduates as they transition to postsecondary education

To review the full Code of Federal Regulations for GEAR UP, see CFR Title 34, Subtitle B, Chapter VI, Part 694.

### 2021-2027 Participating School Districts



On Map	School Division	School Name	Region
1	Accomack County	Arcadia High School	2 - Tidewater
		Chincoteague Middle/High School	
		Nandua High School	
		Tangier Middle/High School	
2	Brunswick County*	Brunswick High School	8 - Southside
3	Danville	Galileo Magnet School	6 - Western
		George Washington High School	
4	Halifax County	Halifax High School	8 - Southside
5	Hampton	Bethel High School	2 - Tidewater
		Hampton High School	
		Kecoughtan High School	
		Phoebus High School	
6	Harrisonburg City	Harrisonburg High School	5 - Valley
		Rocktown High School	
7	Hopewell*	Hopewell High School	1 - Central
8	Lancaster County	Lancaster High School	3 - Northern Neck
9	Manassas City	Osborn High School	4 - Northern Virginia
10	Nottoway County	Nottoway High School	8 - Southside
11	Petersburg*	Petersburg High School	1 - Central
12	Westmoreland County	Westmoreland High School	3 - Northern Neck

\*Divisions participating in the Priority Population Initiative

## Scholarship Information

In support of the GUV objectives, the 2021-28 GUV cohort participants will be eligible to receive a scholarship to use during college.

## Frequently Asked Questions about the GUV Scholarship

### What is the amount of the scholarship?

The federal GEAR UP Regulations guarantee a scholarship amount that an eligible student receives must not be less than the minimum Federal Pell Grant amount at the time of the award. GEAR UP Virginia expects a \$2,500 scholarship for eligible, full-time students available within two years of graduating from high school.

### What requirements must students meet to receive the scholarship?

To be eligible for the GUV Scholarship, students must:

- Be a GUV participant.
- Have earned a high school diploma or recognized equivalent.
- Be enrolled in a two-or four-year undergraduate degree program or high-quality certification program at an eligible institution of higher education located in Virginia or one of its bordering states\*.
- Complete the Free Application for Federal Student Aid (FAFSA) and be eligible for/offered Federal Student Aid.
- Be less than 22 years old at the time of award and disbursement.

NOTE: The student, their college/university/trade school and their program/major must be eligible for and participate in Federal Student Aid

\*Exceptions may be granted on a case-by-case basis for students participating in the academic common market and students with disabilities.

### How do students claim the scholarship?

To request the scholarship, students will be required to complete a scholarship form and submit enrollment and financial aid information. More details will be provided during students' senior year of high school.

### Are there any income restrictions for the scholarship?

No; however, GUV students are still required to complete a FAFSA to verify eligibility for Federal Student Aid. Every eligible student will be offered some type of Federal Student Aid (grants or loans) no matter how much income the student and family earn.

### How will the scholarship funds be distributed and used?

GUV scholarship funds will be paid directly to the institution where the student is accepted for enrollment; they do not go to the student or family's account. These funds may be used to help pay for tuition, fees, books, supplies, equipment required for enrollment, and expenses for special needs services in connection with enrollment/attendance.

### How long do students have to use the scholarship?

The GUV scholarship must be claimed by students and disbursed to their institutions before they turn 22 years old. Students must meet all scholarship eligibility requirements at the time of award and disbursement.

### Does the scholarship have to be paid back?

No. The GUV scholarship is financial aid that does not have to be repaid.

### Who should students contact for information about the GEAR UP Virginia Scholarship?

Students interested in learning more about the scholarship may contact their school's GUV coordinator or the GUV Scholarship Administrator by email at [GUVscholarship@schev.edu](mailto:GUVscholarship@schev.edu).



# **SECTION 2:**

# **ROLES AND RESPONSIBILITIES**

## GEAR UP Virginia Position Description

GEAR UP works most effectively with a team approach. Gaining the support of administrators and staff to create a team of dedicated individuals who will help implement college and career readiness efforts throughout the school(s) is essential to the success of the GUV program. Each of the people fulfilling the positions outlined below will be a vital part of your GUV team.

### GEAR UP Virginia Central Office Liaison (Superintendent or designee)

- Serve as a liaison between the school division and the State Council of Higher Education of Virginia (SCHEV).
- Review and sign the school's Implementation Plan to ensure that planned activities effectively integrate and build upon existing activities and resources and ensure that all GUV program activities are cost-effective.
- Review and sign the Partner Identification Form and Cost Share (PIF) to ensure compliance (signed in the spring of 2021).
- Assist, as needed, in the submission of student data to SCHEV for reporting purposes, including internal feedback, annual, and end-of-grant reports.
- In consultation with the GUV School Team Leader and the school division's Fiscal Officer, oversee budget development for each GUV school.
- Required to attend State Partner and Regional Meetings.

### GEAR UP Virginia Fiscal Officer (School Bookkeeper/Accountant or Central Office Finance Director)

- Manage GUV finance and budget functions including development, preparation and administration of the GUV budget.
- Maintain accurate accounting of receipts and disbursements.
- Serve as fiscal contact to GUV's Fiscal Specialist.
- Monitor all financial transactions and ensure compliance with Commonwealth of Virginia and United States Department of Education fiscal policies and procedures.
- Submit reimbursements and match/in-kind documentation to the GUV office every other month in accordance with the GUV calendar.
- Attend monthly GUV meetings with the Regional Manager.
- Review PIF to ensure compliance.
- Submit budget modifications, as needed.
- Required to attend State Partner and Regional Meetings

### GEAR UP Virginia School Team Leader (School Principal, Assistant Principal or designee)

- Serve on the school based GUV team.
- Provide leadership to GUV teachers and staff.
- Communicate with SCHEV's state GUV staff, as needed.
- Coordinate, develop, review and sign the school's Implementation Plan by identifying strategies and specific activities that will be implemented.
- In consultation with the school's Fiscal Officer and GUV Site Coordinator, develop the GUV program's annual budgetary needs based on the school's Implementation Plan.
- Promote GUV activities to students, parents and staff to ensure maximize participation by all students needing services.
- Ensure that GUV activities are implemented in accordance with established standards and guidelines.
- Assist with the identification and documentation of the school division's match/in-kind requirement.
- Attend monthly GUV meetings with GUV Regional Manager.
- Required to attend State Partner and Regional Meetings.

### **GEAR UP Virginia Site Coordinator (appointed by School Principal); should be a member of school staff**

- Work in consultation with the Regional Manager and school-based GUV team to write the yearly Implementation Plan and budget.
- Implement and coordinate a comprehensive pre-college program for GUV students.
- Document and maintain documentation of GUV program activities, student participation and teacher/staff professional development and give records to Data Coordinator promptly.
- Assist with the distribution and collection of surveys and other evaluation tools.
- Communicate the needs and desires of the school staff to the Regional Manager.
- Encourage GUV students to participate in program activities, targeting specific services to students most in need.
- Serve as a college planning resource for other school staff.
- Work collaboratively with other district-based GUV staff, school personnel, families and the community-at-large, raising awareness of the benefits of a postsecondary education.
- Attend meetings and conferences, including monthly meetings with the GUV Regional Manager.
- Communicate all program expenditures and provide documentation to the GUV Fiscal Officer for reimbursement submission.
- Identify and document matching funds and communicate them with the GUV Fiscal Officer for reimbursement submission.
- Plan and implement programs where GUV scholarship information can be disseminated to students and their parents.
- In cooperation with the Central Office Liaison, Data Coordinator, Family Liaison and other school administrators, prepare and submit comprehensive evaluative and programming reports, including but not limited to the annual Summative Report.
- Required to attend State Partner and Regional Meetings.

### **GEAR UP Virginia Data Coordinator (appointed by School Principal); should be a member of school staff**

- Update student demographic information monthly, including transfers, using the database and/or other tools provided by GUV.
- Communicate with Site Coordinator and Family Liaison to collect activity logs for entry into GUV's student database.
- Maintain hard and digital copies of documentation of GUV activities.
- Enter student participation data from GUV activities and teacher participation in professional development into the database on a weekly basis.
- Assist in the distribution and collection of student and parent surveys.
- In cooperation with the Central Office Liaison, Site Coordinator, Family Liaison and other school administrators, prepare and submit comprehensive student, evaluative and programming reports, including the annual Summative and Performance Report.
- Provide continuous feedback to SCHEV's GUV staff regarding project benchmarks and outcomes.
- Required to attend State Partner and Regional Meetings.

### **GEAR UP Family Liaison (appointed by School Principal)**

- Collaborate with GUV staff, school staff and other key stakeholders to align college and career readiness strategies and programming for students and families.
- Develop grade-level specific family engagement objectives to increase parent and guardian knowledge around college awareness, college application, college success, student non-cognitive skills, financial literacy and technology literacy.
- Organize and manage GUV grant intervention activities directed toward parents and guardians.
- Evaluate and select materials and curricula supporting financial literacy for students and families.
- Assist in the preparation of required grant-related reports focused on program implementation and student outcomes.
- Coordinate publicity, marketing and communications related to family engagement activities.
- Work with the GUV staff and other key stakeholders to create and implement new student and family outreach strategies.
- Required to attend State Partner and Regional Meetings.

**\*\*Other team members may include a Career Coach, GRASP Advisor, College Adviser, School Counselor, Counseling Director, Content Area Specialist, AVID Coordinator, Department Chair, Assistant Superintendent, Librarian, etc.\*\***

**SECTION 3:**  
**THE IMPLEMENTATION PLAN**

### Implementation Plan Overview

The purpose of an Implementation Plan is to outline proposed activities for the program year covering September 1 - August 31 and to provide a detailed budget showing how you plan to pay for activities and staffing. The GUV Implementation Plan should complement-not supplant- existing academic improvement plans.

The Implementation Plans will be based on the GUV Objectives. Plans completed annually for each school will include a set of services required either by GEAR UP regulations, the evaluation model or a critical component of the grant proposal. These will be previously entered into your Implementation Plans template to be distributed to Site Coordinators in the spring of each school year. Beyond the minimum services, schools should also provide other services and activities to the GUV cohort and parents to fulfill the objectives.

Objective 1: Increase the academic performance and college preparation of GUV students

Objective 2: Increase high school graduation and college participation rates

Objective 3: Increase knowledge of college and financial aid among students and their families

The following list derived from the GEAR UP regulations (34 CFR § 694.22) includes approved services and activities that may be provided to students, families and schools. Plans to execute these services should be outlined in the Implementation Plan. These are distinct from the service taxonomy for SCRIBE presented in the data section of the manual.

Audience	Approved Services
<b>Services to Students</b>	Tutoring (before school, during school, after school and summer) Outreach to recruit priority students to participate in programs Mentoring College application workshops Financial aid workshops Graduation and career planning STEM programs College visits College fairs Assisting at-risk children in obtaining summer jobs Academic counseling Financial and economic literacy education or counseling Skills assessments Programs for students who are limited English proficient College entrance examination preparation courses Services enabling students to enroll in Advanced Placement, Dual Enrollment or International Baccalaureate courses
<b>Services to Parents</b>	Workshops on college preparation and financial aid Counseling/advising Programs fostering and improving parent and family involvement Personal and family counseling and home visits Disseminating information that promotes the importance of higher education, explains college preparation and admission requirements, and raises awareness of the resources and services provided by the eligible entities to eligible students, their families, and communities
<b>Services to Schools</b>	Providing professional development opportunities to individuals working with GUV students Supporting the development or implementation of rigorous academic curricula (including college preparatory, Advanced Placement, AVID or International Baccalaureate programs) Supporting dual or concurrent enrollment programs

## Completing the Implementation Plan

### Requirements

To receive GUV funds, each school will be required to submit an Implementation Plan that has been approved by the Superintendent and GUV Director. The Implementation Plan consists of the following components:

1. Cover Sheet
2. Proposed Service Plan
3. Budget Worksheet (Excel file)
4. Budget Narrative
5. Summary

### Maximum Award

Allocation of funds to GUV schools will be determined by the number of selected schools in one division, students served and the complexity of the proposed plans.

### Match Requirements

Annually, school divisions are required to provide a cash or in-kind match for GUV awards (detailed in the Match and In-kind section of the manual). This amount, to be identified in the budget worksheet, must equal the match funds guaranteed in the Partner Identification Form (PIF), which was completed by each school division and approved by the U.S. Department of Education in the State grant application.

### Components of an Implementation Plan

1. **Cover Sheet-** The cover sheet contains school information and must be signed by the Superintendent.
2. **Proposed Service Plan-** This plan details the GUV services each school will provide to support the objectives. Schools will report the proposed service, responsible parties, planned number of students served, timeline and whether the service is new or enhanced with GUV funds.
3. **Budget Worksheet-** Each Implementation Plan requires a budget worksheet (excel file). To complete the budget worksheet, Site Coordinators should transfer the proposed strategies and activities into a line-item budget format. That is, for all proposed activities, break down the total estimated cost of the activity into the six categories of the federal budget listed below. Consult your Fiscal Officer or SCHEV Fiscal Specialist if you are having difficulty identifying proper budget categories for specific line items.
  - a. If at any point during the program year (before June 14), you want to modify or change your approved budget, you must make your request by submitting a budget modification form (Appendix E). See below for more information about completing a budget modification.
4. **Budget Categories-** There are six budget categories: Salaries/Wages, Employee Benefits, Travel, Materials and Supplies, Equipment and Contractual Services (Consultants, Contracts).
5. **Budget Narrative-** The budget narrative is the qualitative description of how each school plans to spend GUV and matching funds to support the services presented in the action plan. It also includes an explanation of how each calculation was determined on the budget worksheet. Numbers should match exactly to those presented in the budget worksheet.
6. **Summary-** The summary is a narrative description of the initiatives that each school intends to implement between September 1 and August 31 and an explanation of how they will enable the school to meet GUV objectives.

### Anticipated Implementation Plan Timeline:

- February - Implementation Plan templates distributed to Site Coordinators
- May 1 - Draft plans due to regional managers
- June 1 - Draft plans returned to schools with comments
- June 30 – Signed Implementation Plans Due
- August 1 - SCHEV approval of Implementation Plans and Budgets

## Completing the Implementation Plan

### Budget Modification Process

Budget modifications will be accepted on an as-needed basis. The last request for budget changes must be received by July 14 for a given program year. Please use the Budget, In-Kind and Program Modification Request Form in Appendix E if you find it necessary to alter your budget. Schools may spend up to 10% more than was approved in a specific expense category without submitting a budget modification. Modifications that will exceed 10% of the expense category, require submission and approval of a budget modification form. For example, if a budget for travel is \$5,000, then the program may incur additional costs of up to \$500 without needing a budget modification. Please follow the procedures listed below to make your request.

1. Consult your Regional Manager to determine if there is a need to complete a budget modification form.
2. If your Regional Manager agrees that a form should be submitted to SCHEV, complete and sign the form and send it to the GUV Fiscal Specialist.
3. SCHEV staff will review your request and will return a copy to your school division marked as Approved, Approved with Conditions or Denied.
4. If your request is Approved or Approved with Conditions, notify your division Fiscal Officer so they can update your budget
5. Upon budget modification approval, all future requests for reimbursement should reflect the newly approved budget (Column B) on the Request for Reimbursement Form.

### Out-of-State Travel Approval

Please use the Out-of-State Travel Approval Form if you have any out-of-state travel. The US Department of Education will evaluate and approve (or not approve) out-of-state travel in advance of any out-of-state travel other than travel related to the NCCEP Annual Conference or the NCCEP Building Capacity Workshop. There are no exceptions.

1. Complete and sign the out-of-state travel form and send it to the GUV Fiscal Specialist.
2. SCHEV staff will review your request and submit it to the U. S. Department of Education.
3. Once approved, approved with conditions or denied, the GUV Fiscal and Administrative Specialist will return the form to your school division.

Note: The approval process can take up to 8 weeks.

**SECTION 4:**  
**EXPENDITURES**  
**AND REIMBURSEMENTS**



### Cost Policies and Spending Practices

GEAR UP funds are federal discretionary grant funds awarded to an organization after its application has been reviewed and approved by the U.S. Department of Education. This investment of taxpayer dollars means that the federal government must set up strong controls over grant projects to ensure the proper use of public funds. An award indicates that an application has met program requirements and is approved for certain kinds of expenditures. Federal funds are restricted funds, meaning the grantee must use the dollars awarded in exactly the manner outlined in their application. All expenditures must meet the requirements outlined in the GEAR UP statute and must use the dollars according to requirements of the U.S. Department of Education and General Administrative Regulations (EDGAR) and federal cost principles.

An approved expenditure is one that has been submitted to the State Council of Higher Education for Virginia (SCHEV), has been reviewed and processed by the Fiscal Specialist, contains the signatures of the Project Director, and gained final approval from the SCHEV Budget & Finance Manager.

The spending guidelines below advise staff about spending GUV funds. Expenditure guidelines in this manual do not comprise a comprehensive list, but rather serve as a reference resource of the categories of spending, the allowability of expenditures and the parameters for spending in each category.

Note: Expenditure guidelines apply to match even if non-GUV funds are used. If the expenditure is not allowable using GUV funds, it is also not allowable to be documented as match.

#### Supplement but not supplant

Federal regulations require that GUV funds supplement existing efforts and not supplant them. Funds are intended to build the capacity of school divisions to create a college-going culture. Therefore, funding may be used to enhance what is already in place or to create new activities (supplement). Funds may not replace other federal, state or local funding (supplant). For example:

- For the last five years, your school has paid for a career exploration software license. This year, the school needs new PE equipment, so you have been asked to pay for the software license with GEAR UP funds to free up funding for PE equipment. This is supplanting and is not allowed.
- For the last several years, your school has annually supported two teachers' attendance at a conference. This year you have been asked to use GUV funds to pay for the teachers to attend the conference. This is supplanting and is not allowed.
- Annually, your school purchases all materials required for instruction in core content courses, including textbooks and a software package. This year, the science teacher has requested that GEAR UP purchase additional equipment to enhance learning and increase the rigor of the coursework. The school does not have funds available for this purchase. This is not supplanting and is allowed because, without GEAR UP funding, your school would not be able to make this purchase.

### Cost Policies and Spending Practices.

Regional Managers oversee the management of federal GEAR UP funds by participating schools. It is the responsibility of the Regional Manager to ensure that an approved Implementation Plan is in place by the schools at all times. Expenditures made without an approved GUV Implementation Plan may not be reimbursed. An approved expenditure is one that has been submitted on the Implementation Plan and reviewed and approved by the GUV Project Director. An approved Implementation Plan will be confirmed with an award letter containing the signature of the GUV Project Director. Implementation Plans can be modified to allow new programs and expenses using the Budget, In-Kind and Program Modification Request Form (Appendix E).

**Allowable costs** are those expenses that are specifically permitted (or not explicitly prohibited) by the laws, regulations, principles and standards issued by the U.S. Department of Education and other authoritative sources and specifically aligned with the approved GEAR UP Virginia state grant proposal.

To help you decide if costs are allowable or not, ask these questions:

Is This Expense...	
<b>Necessary</b>	The expense is critical to implementing the program
<b>Reasonable</b>	A prudent person would determine that the cost is appropriate
<b>Allocable</b>	The expense can be allocated to the objectives of GUV
<b>Compliant</b>	The expense is compliant with the federal administrative regulations that govern the program

Funds must be used to pay for activities that support the GUV goals and objectives, as outlined in the approved state grant application.

To be allowable and allocable funds must:

- Support the implementation of GUV goals and objectives.
- Support enrichment or complementary activities aimed at deepening the student experience in GUV.
- Support school personnel participation in GUV-sponsored professional development, leadership activities or other GUV-sponsored school improvement services.
- Enable student, parent and/or school personnel participation in GUV-sponsored outreach activities.
- Support parent participation in GUV-sponsored and other approved parent engagement activities.

Funds may be used to support activities for eligible GUV students only. **GUV students are defined as students in the class of 2027 who do not have an opt-out form signed by the parent on file at the SCHEV office.** Schools may elect to serve additional students by including them in GUV activities, but GUV funds may not cover costs for those additional, non-program-eligible students. For example, if you take only GUV students on a field trip you may pay the full cost of the trip with GUV funds. If you opt to take both GUV students and other students on a field trip, costs should be proportionately covered by GUV and other funds. An exception is when including non-GUV students will not increase the cost. For example, if you bring in a speaker for GUV students and there are empty seats in the auditorium, you may invite non-GUV students to participate.

#### Budget Utilization Accountability Policy

To ensure that schools maximize the effectiveness of their programs and fully utilize available funds for student benefit, this policy and the "Budget Utilization Accountability Form" are designed to support consistent and impactful spending throughout the program year.

Schools are expected to spend at least 30% of their approved budget by the submission of the January reimbursement packet. If this threshold is not met, the school must complete and submit the "Budget Utilization Accountability Form." This form requires an explanation for the low expenditures and a revised plan outlining how the remaining budget will be utilized for the rest of the program year. The form will be reviewed by the Fiscal Specialist and Project Director for approval.

### Common GUV Expenditures

The following list may help you determine whether your program expenses are allowable or not. Just because a cost is interpreted as being allowable under the OMB cost principles, does not mean that you will be able to make that expenditure. To be eligible for reimbursement of expenditures, they **MUST** be included in your school division's Implementation Plan. If you are not sure about expenditures, we highly recommend you request clarification from your Regional Manager in writing. The information below includes potential expenditures, frequently requested expenditures and/or discussion about their permissibility.

Description	Purpose
<b>Communication costs: allowable</b>	Costs incurred for telephone services, local and long-distance telephone calls, postage, electronic or computer transmittal services and the like are allowable.
<b>Compensation (salaries, wages and fringe benefits): allowable</b>	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 with GUV students.
<b>Consultants and contracts: allowable</b>	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.
<b>Entertainment costs: unallowable</b>	Costs of entertainment, including amusement, diversion and social activities and any costs directly associated with such activities (such as tickets to shows or sports events, amusement parks, recreational activities such as swimming, meals, lodging, rentals, transportation and gratuities) are unallowable. Be sure to distinguish these unallowable expenses from similarly worded and allowable student activities, meetings and conferences that are approved as part of your grant agreement.
<b>Equipment: allowable</b>	Equipment means an article of non-expendable, tangible personal property having a useful life of more than one year and for GUV accounting purposes, has a per-unit cost equal to or greater than \$5,000. Grantees must obtain approval from the SCHEV office before purchasing any item or set of items costing \$1,000 or more.
<b>Food and beverages: generally allowable</b>	Food and beverages may be offered to students and families only in conjunction with structured GUV activities where participants are receiving GUV information. Use of federal grant funds to pay for the cost of alcoholic beverages is strictly prohibited.
<b>Incentives: generally unallowable</b>	GUV funds may not be used to purchase items that strictly serve as incentives for students. All materials and supplies purchased must be necessary for a specific part of the program. For example, t-shirts may only be purchased for student safety on field trips. Purchase of gift cards or other prizes is prohibited with the exception of gas cards, which are justifiable because they help offset travel costs for families.
<b>Memberships, subscriptions and professional activity costs: allowable (with exceptions)</b>	Costs associated with memberships in business, technical and professional organizations are allowable. In addition, subscriptions to business, professional and technical periodicals are allowable. Please note that the OMB circulars make the following exceptions: State entities can use federal funds for membership in civic, community and social organizations, which are allowable as a direct cost with the approval of the US Dept. of Education. State entities cannot use federal funds for membership in organizations substantially engaged in lobbying.

Description	Purpose
<b>Meetings and Conferences: allowable</b>	Costs of approved meetings and conferences, the primary purpose of which is the dissemination of technical information, are allowable. This includes costs of meals, transportation, rental of speakers' fees and other items incidental to such meetings or conferences. Be aware of restrictions pertaining to entertainment costs.
<b>Publications and Printing: allowable</b>	Publication costs—including the costs of printing, distribution, promotion, mailing and general handling—are allowable federal costs if they are allocable to project objectives. A copy of document copied or printed must be included with reimbursement.
<b>Rental Costs of Buildings and Equipment: allowable</b>	With stipulations, rental costs are allowable to the extent that the rates are reasonable in light of such factors as (1) rental costs of comparable property, if any; (2) market conditions in the area; (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 if other options are available.
<b>Supplies: allowable</b>	Supplies Costs incurred for supplies to carry out the grant are allowable. Supplies have a per-unit cost of less than \$5,000. Decorations for events are NOT allowable as an expense; however, balloons can be used to emphasize the signage of your event if this is needed. Otherwise, they are not allowed
<b>Travel Costs: allowable</b>	<p>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 Virginia for GUV staff or students requires prior approval. Travel costs also may be incurred in relation to local events for students, parents or professionals participating in programs authorized by the GUV.</p> <p>If attending a meeting or conference is necessary to achieve the goals and objectives of the grant, and if the expenses are reasonable (based on the grantee's own policies and procedures and state and local laws), GUV funds may be used to pay for travel expenses of grantee employees, consultants or experts to attend a meeting or conference.</p>

### Submitting Reimbursements: Requirements and Procedures

Reimbursement (and match) claims are due every other month and must be submitted through the [secure Box file upload](#) located on the Grant Management page of the GEAR UP Virginia website. The submitting party is expected to provide documentation for all expenses claimed. Payment will be sent by check or electronic transfer within sixty days of receipt of a completed reimbursement packet.

There are three parts required with each submission for your division to be reimbursed for expenditures. They are as follows:

1. GUV Reimbursement and Match Summary Sheet (Appendix B)
2. Request for Reimbursement Form (GUV Reimbursement and Match Reporting Form) (Appendix A)
3. Required backup documentation

#### Step 1: Completing GUV Reimbursement and Match Summary Sheet

The GUV Reimbursement and Match Summary Sheet is a way for schools to organize their reimbursement requests into categories so the SCHEV team can more easily identify the expenses in the documentation.

#### Personnel (Salaries, Wages and Benefits Section)

1. Print the month's Payroll Expense Report for the staff that your district paid for with GUV funds.
2. In the "Vendor Name," column, type the names of the paid staff – list each staff member's name on a separate line.
3. In the "Description" column, enter the reason that you paid for that staff member with GEAR UP funds.
  - a. Substitutes: Type in the space provided whom they subbed for, what day(s) they subbed and what event occurred that required it.
  - b. Other: Type in the space provided what the staff member did, what event occurred where their work was required and what day(s) they worked for GUV.
4. Include timesheets and personnel activity reports.

#### All Other Expenses:

1. Gather all the invoices and detailed receipts that you are submitting with your reimbursement.
  - a. Gather any additional backup you may need (e.g., attendance sheets)
2. Make one copy of the invoice or receipt and any other required backup. Your school district should keep the originals.
3. Organize the invoices and backup according to the section they belong in, then fill out the detail in the space provided:
  - a. "Vendor Name": Type the name that appears on the invoice or receipt. This individual is who the school district paid. Please do not type "P-Card" if that was the method of payment. We must have the name of the actual vendor **who** was paid, **not how** it was paid.
  - b. "Description": Describe or detail the GUV purchase. What was it for? Who was it for?
    - i. Food: What event/activity was food purchased? How many GEAR UP students or family members was food purchased?
  - c. "Amount": Type in the space provided the amount that appears on the invoice or receipt.
    - i. If you are asking GUV to pay a different amount than what is shown: Type in the amount that GUV is supposed to pay (GUV can pay less but cannot pay more than the amount shown on any invoice or receipt). Explain why either in the "Purpose or Reason for Expenditure" column or by including additional documentation.

#### Step 2: Completing the Request for Reimbursement Form

At the top of the spreadsheet, fill in your school division's name, federal tax ID, address, the name of the GUV Fiscal Officer, email address, the date range for which you are requesting reimbursement and the total amount of reimbursement requested.

- **Column B:** This is your approved budget based on the Implementation Plan. Once you fill it in at the beginning of the year, it should not change unless you submit a budget modification form.
- **Column C:** This column includes any previous expenses for which you have been reimbursed. On your first reimbursement of the year, this column will be blank.
- **Column D:** The column includes the expenses for which you are currently requesting reimbursement. It should match exactly with the "GUV Reimbursement and Match Summary Sheet" and the provided documentation.
- **Column E:** Do not do anything to this column. The template will automatically populate the column based on the amounts you have entered in columns C and D.
- **Column F:** Do not do anything to this column. The template will automatically subtract the amounts you have entered in columns C and D from column B.
- The "**Total**" row will automatically add all expenses entered in the columns.

**\*\*Each Reimbursement Request Form must have an original signature to be processed at SCHEV.\*\***

### Required Back-up Documentation

All reimbursement packets must include the following documentation:

1. Initiation of cost: Documentation showing the original request or approval for the expense (e.g., purchase orders, pre-approval forms).
2. Proof of cost: Evidence of the actual expense incurred (e.g., itemized receipts, invoices).
3. Proof of payment: Documentation confirming that payment was made (e.g., credit card statements, copies of checks, payroll reports).
4. Linkage to GUV Service: When applicable, documentation demonstrating how the expense relates to a GUV service or program (e.g. student sign-in sheets, event agendas).

For a more detailed list of documentation by budget category, see Appendix H.

Note: All documentation should be clear, legible and organized in a logical manner within the reimbursement packet.

### Time and Effort Policy

All employees paid in full or in part with federal funds must keep specific documents to demonstrate the amount of time they spent on grant activities. (2 C.F.R. Part 200.430(i)(1)) In addition, employees paid from state and local funds, but whose salaries are used for cost sharing or match, must also keep time and effort documentation. (§ 200.430(i)(4)). Charges to federal awards for salaries and wages must be based on records that accurately reflect the work performed.

All GEAR UP staff must complete a monthly time and effort form and/or a timesheet as required by SCHEV or school district policy and practice. Time and Effort forms for match and individuals receiving a stipend are available in Appendix C. These must be completed monthly and signed by the Regional Manager. When you use in-kind personnel contributions as match, they must fulfill the same reporting obligations as if they were receiving federal funds.

### Final Considerations

- Districts will follow their established, official travel policies. GUV may request copies of division policies and contract agreements if warranted.
- GUV reserves the right to deny any claim deemed unallowable, unallocable, and unreasonable.
- Under NO circumstances may federal funds be used to pay for entertainment to include amusement, sports, or social activities.

You must retain all records for GUV expenditures and match for 3 years after the Final Performance Report is approved at the end of the grant. The records may be subject to program review or audit. For this GEAR UP Grant, 2021-2028, records must be retained through 2031, subject to the approval of the Final Performance Report

**\*\*Any funds not spent DO NOT carry forward to the new program year.\*\***

**SECTION 5:**  
**MATCH AND IN-KIND**

## Overview of Match and In-kind

### Understanding Match

GEAR UP Virginia is required to collect a dollar-for-dollar match, meaning that for every dollar of federal grant money spent on the project, we must collect an equal dollar amount of match in the form of state, local or donated funds. It is our responsibility to collect and document this match with the same care and attention to accuracy, accountability and timeliness as documenting the use of federal grant funds. If we do not meet the match requirement, we could have our federal funds reduced or our award could be terminated. Qualifying match contributions must be necessary to accomplish program activities, verifiable and only allowable according to GEAR UP guidelines. Match follows the same rules as the actual funds spent on GUV. Match must be allocable, allowable and reasonable.

### Definition of Match

Match or Cash Match is the non-federal share of program costs or money spent on the program that comes from a non-federal source. If an organization purchased the goods or services, paid for GUV travel, etc. but did not request reimbursement from the grant, then the generic term match applies. If another person or organization donated the goods or services, then the more specific term in-kind applies.

### Definition of In-Kind

"In-Kind" refers to non-cash contributions of goods or services made by third-party individuals or organizations to GUV Projects. Examples of in-kind include work done by unpaid volunteers in support of GUV and donations of supplies, facilities/space usage or equipment.

### School Division Partner Match Requirement

In GUV schools or divisions, the in-kind/match requirement is set at an annual minimum of the amount listed on your Partner Identification Form (PIF). If more in-kind/match is budgeted on your Implementation Plan than is in your PIF, this becomes the obligation and it will be reflected on the award letter. SCHEV also has an annual match commitment and will work to exceed that commitment for every year of the grant. If you have questions about your Partner Identification Form, please direct them to your Regional Manager.

The same guidelines that govern GUV expenditures, apply to match and in-kind

1. Match must be allocable, allowable and reasonable.
2. Match must be necessary to implement the program.
3. Match must be compliant with the federal administrative regulations that govern the program.
4. If a cost is unallowable, it is not an allowable match.
5. Match cannot be claimed from other sources/programs that are federally funded.
6. Qualifying in-kind match contributions must be verifiable.

### Supplement NOT Supplant

If the goods or services were being provided prior to GUV, that is supplanting and they cannot be counted as match. If the match isn't exclusively for GUV students or parents, or because of GUV activities or services, it cannot be counted as match.

### Sharing Match

If a partner or vendor works with or serves other federal grants, a match contribution can only be counted once. However, match can be split and proportionally shared between the federally funded programs. Each grant must document their portion of the contribution separately and the match must be used for the grant to which it was contributed.

### Paid GUV Partners

If school-based staff's (i.e., Site Coordinator and Data Coordinator) time and effort may be counted as match if the duties are separate and distinct from their role as a GUV Coordinator.



### Other Federal Funds

Match cannot be claimed from other sources/programs that are federally funded. In other words, if you receive other federal grants, it cannot be used as match to the GEAR UP program. Note: 21st Century Grants, AmeriCorps, the U.S. Army, U.S. Marine Corps, U.S. Navy, U.S. Air Force and the U.S. Coast Guard are all federally funded programs, and member time cannot be counted as match.

## How to Meet Required Match

Collecting and documenting in-kind/match on an ongoing basis is wise, efficient and much less stressful than attempting to catch up or go back and document it. When collected as part of the day-to-day program, it is easier to record accurately and monitor regularly. Breaking down a grant's match requirement on a monthly or quarterly basis makes it manageable and attainable. Staff are encouraged to create match binders or folders to keep with them as they do their GUV work. Having the information and forms on hand makes it easier to collect match documentation as it occurs.

### Sources of In-Kind

Below is a list of sources of match/in-kind. It is not an exclusive list.

#### 1. Teacher Time

- Teacher time beyond the contract day, in support of GUV, counts as match. This includes planning time for GUV classroom activities, substitute preparation when the teacher is chaperoning a GUV trip, developing new rigorous lessons that support GUV objectives, attending GUV sponsored professional development, etc.
- All teacher time submitted as match must support the goals and objectives of the program and be in addition to the general tasks expected of a teacher.
- The teacher's normal hourly rate plus benefits is used to calculate the value. Schools may submit a rate sheet as documentation.

#### 2. Other School Staff Time: Administrators and Classified

- All time devoted to GUV-specific activities can be counted as match at the same rate that person is normally paid, including benefits. This includes entering student data, collecting student sign-in information, talking to parents about GUV, fielding GUV-related phone calls, GUV meetings, working on GUV mailings, preparing reimbursements, prepping for GUV events, etc.
- All staff time submitted as match must support the goals and objectives of the program and be in addition to the general tasks expected of the employee.
- To document this as match, each employee must complete the Time and Effort Form (Appendix C)

#### 3. Volunteer Time

- When members of the community, families or students volunteer to support GUV students and activities, their time is counted as in-kind.
- GUV recommends using the standard volunteer value set by [www.independentsector.org](http://www.independentsector.org).
- To document this as match, each volunteer must fill out and sign the Certification of Volunteer Time Rendered (Appendix D)

#### 4. Professional Development

- Any professional development paid for by the school division that supports GUV objectives and would not have occurred without GUV can be counted as match.
- Examples include if the division pays for the GUV coordinator to attend a conference at a local community college, training on financial aid or for coordinators to attend NCCEP conferences. Also included is on-site or school-sponsored PD for GUV teachers that promotes GUV objectives such as rigorous curriculum, STEM, SEL, etc.

### 5. Materials and Supplies

- Items purchased with the school's general funds, private grants or items donated to the GUV program that support GUV students and objectives. This includes:
  - Copies
  - Professional printing of GUV materials
  - Envelopes
  - Mailings (postage)
  - Event supplies
  - Food
  - School purchased licenses or subscriptions to benefit the GUV Program (1-year at a time)
  - Software
  - Office Supplies
  - Books
  - Specialized equipment for specific activities i.e., sound system, microphones for special assemblies

### 6. Discounts

- The documented amount on the price of products or services reduced or waived specifically for the GUV program

### 7. Facility Usage

- The value should be from the school's rate sheet (sample rate sheet in Appendix G) or from documented comparable space rentals in the area.
- Facility use donated by a third party (i.e., College Campuses) is allowed as match and can be based on the fair market rental rate, as long as the third party provides facility rental rates that show what they could otherwise have charged to use the space.

### 8. Travel

- Travel costs for GUV-approved events that were NOT reimbursed by GUV. This includes expenses for transportation (including mileage), lodging, subsistence and related items incurred by employees who are in travel status.
- Division money spent on transportation for GUV activities. A percentage of bus maintenance costs may also be used.

### Questions to ask after each GUV event to find all opportunities for match and in-kind:

1. Are there partners? If so, what are their contribution(s)?
2. Where is the activity, service or event taking place (e.g., facilities, utilities)?
3. Are there donations (e.g., food, paper goods, etc.)?
4. Is the equipment being used for the activity, service or event? What would it cost to rent the equipment (e.g., microphone, computer, overhead projector, etc.)?
5. Who is attending the activity, service or event (e.g., speakers, personnel, parents, etc.)?
6. Are any volunteers helping with the event (e.g. teachers, administrators, community volunteers)?
7. Has travel to and from the activity, service or event been counted (e.g., bus, gas, airfare, bus driver, mileage reimbursement, hotel fees, etc.)?
8. Has setup or cleaning for the activity, service or event been counted If so, who will set up and clean up? (e.g., custodian, parent volunteers)?

### Submitting Match: Requirements and Procedures

Match claims are due every other month with the request for reimbursement. Schools must submit an in-kind/match packet with each reimbursement request even if the amount of match claimed is zero. **GEAR UP Virginia maintains the right to withhold payment of school divisions' requests for reimbursement until the accompanying in-kind/match submission has been received.** The submitting party is expected to provide support for all match claimed. Documented match will receive the same level of scrutiny as reimbursement requests.

There are three parts required with each submission for your district to be credited with in-kind/match. They are as follows:

- Reimbursement and Match Summary Sheet (Appendix B)
- Match and In-Kind Reporting Form (Appendix A)
- Required backup documentation
- OPTIONAL: GEAR UP Virginia In-kind Contribution Form (Appendix H)

**Please see the instructions in the previous section for completing the Reimbursement and Match Summary Sheet and Reporting Form.**

### GEAR UP Virginia In-kind Contribution Form

Because in-kind calculations can be tedious and confusing, some schools like to use the GEAR UP Virginia In-kind Contribution Form as a tool for organizing the values of the in-kind services documented in their match packet. Please review the form in Appendix H to see if it will be a helpful tool for your process.

**You must retain all records for GUV match for 3 years after the Final Performance Report** is approved at the end of the grant. The records may be subject to program review or audit. For this GEAR UP Grant, 2021-2028, records must be retained through 2031, subject to the approval of the Final Performance Report.

**\*\*All budgeted match should be in by the end of the program year (due each September with final reimbursement). The last reimbursement payment may be withheld if all match has not been submitted. Significant progress on match must be demonstrated or funds can be suspended or reduced.\*\***

# **SECTION 6:**

# **DATA REPORTING**

## GUV Data and Reporting Requirements

GEAR UP Virginia (GUV) data is a key part of program planning, evaluation and reporting. To evaluate the progress of GUV in meeting its stated Project Goals and Objectives and associated benchmark objectives, the grant requires the rigorous collection of data. Moreover, the ability of GUV to meet federal reporting requirements depends upon the quality of data provided by partner schools.

Each April, GUV must demonstrate to the U.S. Department of Education that it is conducting an effective program through the submission of the Annual Performance Report (APR). This includes providing information that shows participants in the program are making satisfactory progress toward the objectives established and that GUV is providing all required services and activities approved in the GUV grant application. GUV uses the aggregate class of 2026 as the control group for data reporting. This means that the performance of GUV students is compared to the students in the class year above them in certain measures to assess the effectiveness of GUV programming.

GUV collects the data for the APR in multiple ways, including:

1. Regular updates to the SCRIBE database
2. Annual Summative Report
3. Surveys

## SCRIBE Database

The most important tool GUV school-based data coordinators will use to collect reliable data on GUV students is the SCRIBE database. This database is used to collect individual students' demographic, academic and participation information. SCRIBE is also used to track GUV services; the SCRIBE Service Taxonomy (below) outlines the system that data coordinators should use to classify services entered into SCRIBE. All school-based data coordinators will receive training and assistance in this role, as recording data in SCRIBE according to a regular schedule is an essential task.

## Summative Evaluation Report

The Summative Report is a performance report that must be completed annually by school GUV teams and includes both quantitative and qualitative aspects. SCHEV will distribute the Summative Report template each year. It is imperative that SCHEV receives these reports on time so there is enough time to analyze each report to write one unified, state-wide narrative and compile the data for the APR.

## Surveys

GUV administers a survey to GEAR UP students, parents and/or administrators throughout the grant cycle. The purpose of these surveys is to gauge the knowledge, attitudes and experiences of students, parents/guardians and school staff to measure and increase the effectiveness of the GUV program at schools and around the state. The U.S. Department of Education requests that GEAR UP should aim to administer surveys to all current GEAR UP students and one of each of their parents. GUV's goal response rate for Student Surveys is 80% and for parent/guardian surveys is 50%.

The Data Collection Plan below outlines the types of information that GUV data coordinators are required to collect, the frequency with which they should be recorded, and the method through which they should be reported.

### GEAR UP Virginia Data Collection Plan

Type of Data to be Collected	Frequency	Method
Student Demographics	Monthly	SCRIBE
Service Information and Participation (Students, Parents and/or Staff)	Monthly	SCRIBE
Promotion to Next Grade Level	Annually	SCRIBE
Student/ Parent Knowledge and Aspirations for College	Annually	Annual Survey
High School Graduation and Diploma Type	12th Grade	Summative Report

## Student Service Category Definitions and Types

Service types denoted with a + can also be used for parent participation.

### Tutoring / Test Prep

These services provide additional academic instruction designed to increase the academic achievement of students. They can occur: one-on-one or in small groups; before, during, or after school, during study or lunch breaks or on weekends; provided by GEAR UP staff, hired tutors, teachers, trained peers and/or volunteers.

#### Service Types:

- STEM Tutoring
- Other Tutoring
- Standardized Test Prep
- Standardized Test Exam

### Academic Enrichment

These are services that take place outside of the classroom and are not part of regular classwork but which supplement academic learning by providing students with additional/alternative ways to experience learning.

#### Service Types:

- STEM Field Trip
- Other Field Trip
- Academic Club

### Counseling / Advising / Mentoring

These services span a spectrum of activities that provide personalized assistance in a one-on-one or small group setting.

#### Service Types:

- Counseling +
- Mentoring
- Academic Advising / Planning +
- College Application Support
- Career Advising / Planning +
- Career Interest Inventory

### Financial Aid Support

These services assist students' understanding and navigating the complexities of financial aid, including providing hands-on assistance with the FAFSA and scholarship applications, presentations on financial aid or literacy, using financial aid or literacy curriculum and the benefits and how-tos of participation in college savings plans.

- Service Types:
  - Financial Aid Prep +
  - Financial Aid/ Scholarship Application Support +
  - Financial Literacy +

### College Exposure

These services provide information to students about particular colleges and college life in general

- Service Types:
  - College Visit +
  - College Student Shadowing
  - College Fair +
  - College Representative Meeting

### Career Exposure

These services provide information to students about particular careers and career fields.

- Service Types:
  - Job Site Visit
  - Job Shadowing
  - Internship/ Apprenticeship
  - Career Fair/ Career Day
  - Career Representative Meeting

### Workshops

These are services that include general information at the classroom or large-group level. Workshops are offered to groups of students on topics like secondary school success and college awareness and general elements of college readiness such as study skills, self-monitoring, goal-setting, time management and problem-solving. This includes guest speakers that motivate students. Workshops are informational in nature and are not intended to provide direct counseling or guidance to individuals or small groups of students.

- Service Types
  - Transitional Services
  - Guest Speaker +
  - Student Recognition +
  - Parent/ Family Events +
  - Other Workshops

### Summer Programs

These are services that include an experience over one or multiple days during the summer. Summer programs could be a statewide GEAR UP summer camp, a local summer camp funded by GEAR UP, a residential GEAR UP program hosted by a college/ university/ community organization or another camp attended by a GEAR UP student that supports the GEAR UP mission. These programs include academic enrichment, college preparatory programs/camp experience, credit recovery and/or remediation programs.

- Service Types:
  - Residential Summer Program
  - Summer Program - Enrichment
  - Summer Program - Remedial

# **SECTION 7: COMMUNICATIONS**



**Mission:** “GEAR UP Virginia is a federal grant program with the purpose of significantly increasing the number of low-income and first-generation students who are prepared to enter and succeed in post-secondary education”

### Discussion Points

GUV communicates with three unique audiences. Below are topics to discuss when engaging each audience.

- **General Public:**

- An educated workforce is vital for the continued economic prosperity of Virginia communities.
- Developing a college and career-going culture requires support from the larger community, not just parents and schools.
- GEAR UP Virginia initiatives will:
  - Increase the academic performance and college preparation of GUV students.
  - Increase the number of students in rigorous courses.
  - Increase knowledge of college and financial aid among students and their families.
  - Improve college readiness rates.
  - Increase college enrollment rates.

- **School Personnel/ Community Partners**

- GEAR UP Virginia relies on your knowledge to help students build confidence so they aspire to attend postsecondary education and have the resilience to overcome challenges along the way.
- College is a realistic goal for every student.
- Having a postsecondary degree is important for your long-term goals.
- Higher education isn't just a bachelor's degree at a four-year college or university. It is:
  - Certificate programs
  - Trade schools
  - Apprenticeships
  - Military

- **Students**

- Postsecondary education is a real and attainable goal.
- Having a college degree/certificate/credential is important for your long-term goals.
- Higher education isn't just a bachelor's degree at a four-year college or university. It is also:
  - Certificate programs
  - Trade schools
  - Apprenticeships
  - Military
- GEAR UP Virginia will support you as you navigate the process and help you make decisions.

GUV encourages you, when possible, to create or share materials that would be of use to community/school members who are NOT directly involved in GUV. This will help build support from external audiences for the wider goals of the program. You may print resources that are beneficial to the cohort as well as the community at large.

## Logo and Print Materials

To help protect the GUV name and ensure consistency in communication efforts, all schools and partner organizations are required to adhere to the following guidelines:


- All widely disseminated promotional or informational materials will reference GEAR UP Virginia and, when appropriate, may use the language, "This initiative/program is supported with funding provided through GEAR UP Virginia, a federally funded initiative administered by the State Council of Higher Education for Virginia."
- Schools and partner organizations will use the official GEAR UP Virginia logo as a prominent visual element on all materials.
- Organizations should avoid the creation of their own GEAR UP Virginia logos. School district-specific GUV logos created by GEAR UP Virginia will be distributed for use.
  - School-specific GEAR UP Virginia Logos can be located on the [Grant Management page](#) on the GEAR UP Virginia website.


## Website


GUV encourages schools to make GUV websites or include GUV on their school or division websites. Websites should include the GUV logo and should provide a link to the state website ([www.gearupva.org](http://www.gearupva.org)).

## Social Media

Social media is a great way to engage the general public, parents and students. Typically, the best social media platform to engage parents is Facebook. Students normally follow Instagram and Tik Tok. To engage the general public, GUV has the following social media accounts:

 Instagram: @gearupvirginia

 Twitter: @GEARUPVa

 Facebook: GEAR UP Virginia

GEAR UP strongly encourages schools to use their division or school social media accounts or to create their own GEAR UP social media accounts to share program highlights and updates.

Hashtags to use on GUV social media posts are:

- #GEARUPVa
- #GEARUPWorks
- #MyGEARUPStory

**\*\*Do not forget to tag GEAR UP Virginia in your posts.\*\***

# APPENDIX

# Policies and Procedures Manual

APPENDIX A: GUV Reimbursement and Match Reporting Forms  
(Page 1 of 2)



## APPENDIX A: GUV Reimbursement Cover sheet



### STATE COUNCIL OF HIGHER EDUCATION FOR VIRGINIA

#### GEAR UP Virginia (GUV) 2021-2028 Request for Reimbursement Form

Organization: \_\_\_\_\_ Federal ID#: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

Reimbursement Requested for the Period: \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_

Amount Requested: \$ \_\_\_\_\_ ( Equal to "Total" under (D) )

Column A Budget Categories	Column B Approved Budget	Column C Previous Expenditures	Column D Current Expenditures	Column E Y-T-D Expenditures (including current)	Column F Balance (B-E)
Salaries & Wages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employee Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Materials & Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Consultants & Contracts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>TOTAL</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The organization claims reimbursement for disbursements made under the provisions of the GEAR UP program. This is to certify that the expenditures listed have been paid in accordance with federal/state-approved policies and or regulations of SCHEV and the U.S. Department of Education for allowable services and done with prudence. It is further certified that the original attached documentation of expenses and further supporting information are also retained and available in the office of the organization and may be available, upon request, to support the claim which is subject to federal/state audits.

Authorized Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_ Signature: \_\_\_\_\_

**SCHEV Use Only:**

Cost Code: \_\_\_\_\_

Organization Name: \_\_\_\_\_ Date Invoice Received: \_\_\_\_\_

Invoice/ Ref. # (if applicable) \_\_\_\_\_ Amount Approved: \_\_\_\_\_

Comments:

GEAR UP Project Director: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\* Use the excel file when completing this form.\*\***

# Policies and Procedures Manual

APPENDIX A: GUV Reimbursement and Match Reporting Forms  
(Page 2 of 2)



## APPENDIX A: GUV Reimbursement Cover sheet



STATE COUNCIL OF HIGHER  
EDUCATION FOR VIRGINIA

GEAR UP Virginia (GUV) 2021-2028  
Match and In-Kind Reporting Form

Organization: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

Reporting Period: \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_

Budget Categories	Budgeted	Provided	Source
Salaries & Wages	\$0.00	\$0.00	
Employee Benefits	\$0.00	\$0.00	
Travel	\$0.00	\$0.00	
Materials & Supplies	\$0.00	\$0.00	
Consultants & Contracts	\$0.00	\$0.00	
Other:	\$0.00	\$0.00	
	\$0.00	\$0.00	
	\$0.00	\$0.00	
TOTAL	\$0.00	\$0.00	

Match Budgeted:  
Match Previously Reported:  
Match Provided This Period:

Authorized Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_ Signature: \_\_\_\_\_

\*\* Use the excel file when completing this form.\*\*

**APPENDIX B: Reimbursement and Match Summary Sheet**



**STATE COUNCIL OF HIGHER EDUCATION FOR VIRGINIA**

**GEAR UP Virginia (GUV) 2021-2028  
Reimbursement and Match Summary Sheet**

1000 Salaries and Wages					
Name/ Vendor Name	Description	Amount	Date Purchased	Date Paid	Check #
John Doe	Site Coordinator for GUV	\$ 500.00		6/1/2015	1234
	<b>Total</b>	\$ 500.00			

2000 Employee Benefits					
Name/ Vendor Name	Description	Amount	Date Purchased	Date Paid	Check #
John Doe	FICA	\$ 92.39		6/7/2015	2345
	<b>Total</b>	\$ 92.39			

3000 Consultants and Contracts					
Name/ Vendor Name	Description	Amount	Date Purchased	Date Paid	Check #
CoolSpeak	Leadership camp for 8th grade students	\$ 1,500.00		6/1/2015	3456
	<b>Total</b>	\$ 1,500.00			

5000 Travel					
Name/ Vendor Name	Description	Amount	Date Purchased	Date Paid	Check #
John Doe	Gas mileage for GEAR UP Virginia Meeting	\$ 35.00		6/10/2015	4567
	<b>Total</b>	\$ 35.00			

6000 Materials and Supplies					
Name/ Vendor Name	Description	Amount	Date Purchased	Date Paid	Check #
Wal-Mart	Purchase at 6 Wal-Mart for STEM Activities	\$ 40.00		6/10/2015	5678
	<b>Total</b>	\$ 40.00			

\* Use the excel file when completing this form.\*

\*\* Please submit one version with your reimbursement request and a different version with in-kind/matching funds\*\*

## APPENDIX C: Time and Effort Form

### GEAR UP Virginia Individual Time and Effort Form (In-kind)

Employee: \_\_\_\_\_

Federal Program: \_\_\_\_\_

Title: \_\_\_\_\_

Reporting Month: \_\_\_\_\_

The Individual Time and Effort form is for school personnel that give part of their time to the GUV students as in-kind. Individuals should use this form only if they are not compensated with GEAR UP funds or any other federal funds for donating their time to the GUV cohort.

*Enter the approximate number of hours associated with GUV tasks. All activities must equal total time/effort at the bottom and should list the salary percentage listed in the implementation plan if applicable. Note: Grades impacted can only be GUV students.*

Time/Effort Description:	Time (Hrs.)
TOTAL TIME/EFFORT	

Total Hours \_\_\_\_\_ X Hourly Rate \_\_\_\_\_ = Total \$ \_\_\_\_\_ Salary & Wages Match

Total Salary Match \_\_\_\_\_ X Benefits % \_\_\_\_\_ = Total \$ \_\_\_\_\_ Benefits Match

Total Salary Match \_\_\_\_\_ + Benefits Match \_\_\_\_\_ = Total \$ \_\_\_\_\_ In-kind match

The information provided on this form is an accurate estimate of the time/effort I contributed to the GEAR UP Virginia program.

Staff Member's Signature: \_\_\_\_\_

## APPENDIX C: Time and Effort Form for Stipend Recipients



STATE COUNCIL OF HIGHER  
EDUCATION FOR VIRGINIA

GEAR UP Virginia (GUV) 2021-2028  
Personnel Activity Report for Stipend Positions

Employee: \_\_\_\_\_

Federal Program: \_\_\_\_\_

Title: \_\_\_\_\_

Reporting Month: \_\_\_\_\_

*Enter a summary description of GEAR UP Virginia work performed during the reporting month specified above.*

Activity Summary

I hereby certify that this report is an after-the-fact determination of the total activity and actual effort expended on behalf of the GEAR UP Virginia grant for the month reported.

Employee's signature: \_\_\_\_\_

Date : \_\_\_\_\_

Regional Manager's signature: \_\_\_\_\_

Date: \_\_\_\_\_

---

After signature, send to the Fiscal Officer to be included in the next reimbursement



## APPENDIX D: Volunteer Certification Form



**STATE COUNCIL OF HIGHER  
EDUCATION FOR VIRGINIA**

**GEAR UP Virginia (GUV) 2021-2028  
Certification of Volunteer Time Rendered**

\_\_\_\_\_ **School Name/ District**

This is to certify that \_\_\_\_\_ (Name) rendered volunteer time in performing the following activities:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Total hours for the period are \_\_\_\_\_ at a rate valued at \$ \_\_\_\_\_ / hour.

The source for this rate: \_\_\_\_\_

The total value of the contribution: \$ \_\_\_\_\_

Date	No. of Hours	Date	No. of Hours
		<b>Total</b>	

Volunteer's signature: \_\_\_\_\_

Date : \_\_\_\_\_

Supervisor's signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Policies and Procedures Manual

APPENDIX E: Budget, In-Kind and Program Modification Request Form



## APPENDIX E: Budget, In-Kind and Program Modification Request Form



STATE COUNCIL OF HIGHER  
EDUCATION FOR VIRGINIA

GEAR UP Virginia (GUV) 2021-2028  
Budget Modification Form

<b>Contact Name:</b>																													
<b>Contact Name:</b>	<b>School Division:</b>																												
<b>Phone:</b>	<b>Email:</b>																												
<p><b>Budget Modification:</b> Detail the line-item movement and specific dollar amounts. Please indicate what program changes will occur because of the modification, including 1) what will not occur, as well as 2) new programming that will occur. Additional pages may be attached.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 30%;">Budget Categories</th> <th style="width: 20%;">Original Budget</th> <th style="width: 20%;">Change (+/-)</th> <th style="width: 30%;">Revised Budget</th> </tr> </thead> <tbody> <tr><td>Salaries and wages</td><td></td><td></td><td></td></tr> <tr><td>Benefits</td><td></td><td></td><td></td></tr> <tr><td>Travel</td><td></td><td></td><td></td></tr> <tr><td>Materials and Supplies</td><td></td><td></td><td></td></tr> <tr><td>Consultants and Contracts</td><td></td><td></td><td></td></tr> <tr><td style="text-align: right;"><b>Total</b></td><td></td><td></td><td></td></tr> </tbody> </table>		Budget Categories	Original Budget	Change (+/-)	Revised Budget	Salaries and wages				Benefits				Travel				Materials and Supplies				Consultants and Contracts				<b>Total</b>			
Budget Categories	Original Budget	Change (+/-)	Revised Budget																										
Salaries and wages																													
Benefits																													
Travel																													
Materials and Supplies																													
Consultants and Contracts																													
<b>Total</b>																													
<p><b>Program Modification:</b> Describe the program changes that will occur because of the modification, including 1) what will not occur, as well as 2) new programming that will occur. Additional Pages May be attached.</p>																													
<b>Authorized Representative Signature</b>	Authorized Representative (Print or Type Name)	Title:																											
	Signature of Authorized Representative	Date:																											
<b>For SCHEV use only</b>	Amendment No: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4																												
	<input type="checkbox"/> Approved <input type="checkbox"/> Approved with conditions <input type="checkbox"/> Denied																												
	Signature of GEAR UP Program Representative:	Date:																											

## APPENDIX F: Out of State Travel Request Form



### STATE COUNCIL OF HIGHER EDUCATION FOR VIRGINIA

GEAR UP Virginia (GUV) 2021-2028  
Out of State Travel Request Form

<b>Contact Name:</b>															
<b>School Name:</b>	<b>School Division:</b>														
<b>Fax:</b>	<b>Email:</b>														
<b>Location and Purpose of Trip</b> (please list date(s) of trip, location and the purpose of trip, linking it to academic objectives, college readiness, etc.)															
<p><b>Cost of Trip:</b> Please list costs associated with this out-of-state travel and an estimated total cost. Please include an estimated number of people attending. <b>Please note GUV must have out-of-state travel for student trips or Professional Development approved in advance by the US Department of Education for any out-of-state travel other than travel related to the NCCEP Annual Conference or the NCCEP Capacity-Building Workshop. There are no exceptions.</b></p> <p>Number of attendees: _____</p> <p>Possible costs are listed below. Please Edit as needed.</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e0e0e0;"> <th style="padding: 5px;">Item</th> <th style="padding: 5px;">Cost</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Transportation</td> <td style="padding: 5px;">\$</td> </tr> <tr> <td style="padding: 5px;">Lodging</td> <td style="padding: 5px;">\$</td> </tr> <tr> <td style="padding: 5px;">Meals</td> <td style="padding: 5px;">\$</td> </tr> <tr> <td style="padding: 5px;">Chaperones</td> <td style="padding: 5px;">\$</td> </tr> <tr> <td style="padding: 5px;">Registration</td> <td style="padding: 5px;">\$</td> </tr> <tr> <td style="padding: 5px;"><b>Total</b></td> <td style="padding: 5px;">\$</td> </tr> </tbody> </table>		Item	Cost	Transportation	\$	Lodging	\$	Meals	\$	Chaperones	\$	Registration	\$	<b>Total</b>	\$
Item	Cost														
Transportation	\$														
Lodging	\$														
Meals	\$														
Chaperones	\$														
Registration	\$														
<b>Total</b>	\$														
<b>Authorized Representative Signature</b>	Authorized Representative (Print or Type Name)	Title:													
	Signature of Authorized Representative	Date:													
<b>For SCHEV use only</b>	<input type="checkbox"/> <b>Approved</b> <input type="checkbox"/> <b>Approved with conditions</b> <input type="checkbox"/> <b>Denied</b>														
	Sent to US Department of Education on: _____														
	Signature of GEAR UP Program Representative:	Date:													

## APPENDIX G: Sample Rate Sheet

Facility	Non-Profit Rates Level 1 Users	Commercial Rates Level 2 Users
Classroom	\$ 8.47	\$ 33.92
Library	\$ 11.31	\$ 44.48
Multipurpose Room	\$ 16.96	\$ 67.80
Small Gym	\$ 22.61	\$ 91.11
Large Gym	\$ 49.43	\$ 196.34
Shower Room	\$ 42.49	\$ 169.51
Exercise Room	\$ 19.78	\$ 76.29
Specialty Classroom (Band/ Choir/ Science)	\$ 11.30	\$ 44.52
Kitchen	\$ 19.08	\$ 76.29
Swimming Pool w/ Heater	\$ 49.44	\$ 134.18
Baseball Field (90')	\$ 8.47	\$ 33.92
Softball Field (60')	\$ 7.08	\$ 28.27
Stadium (Football Field/Track)	\$ 57.07	\$ 171.21
Field Lights	\$ 28.27	\$ 28.27
Soccer Field (grass)	\$ 21.54	\$ 70.63
Restrooms (2)	\$ 7.08	\$ 27.56
Track	\$ 19.78	\$ 79.11
Tennis Courts (minimum 2 hours)	\$ 9.06	\$ 18.13
Stage Lighting	\$ 10.59	\$ 42.66
P.A. Systems	\$ 7.18	\$ 28.27
Parking Lot	\$ 9.06	\$ 18.13
Playground/ Blacktop	\$ 9.06	\$ 18.13
Quad (HS/MS)	\$ 9.06	\$ 18.13
Custodial Regular Rate		\$ 39.32
Custodial Overtime Rate (Saturday)		\$ 58.98
Custodial Overtime Rate (Sunday)		\$ 78.64
Cafeteria Worker Regular Rate		\$ 37.10
Cafeteria Worker Overtime Rate (Saturday)		\$ 55.65
Cafeteria Worker Overtime Rate (Sunday)		\$ 74.20

Extra Pick Up Garbage Rates:

4 yd. Dumpster: \$129.55

7 yd. Dumpster: \$226.72

Level 1: Non-Profit organizations with proof of 501(c)(3)

Level 2: For-Profit and commercial organizations

## Reimbursement Packet Documentation Checklist

### Salaries and Wages & Benefits

- Personnel Activity Reports** for all stipend recipients
- Timesheets or Time and Effort Forms** for all other grant-paid individuals (proof of cost)
- Payroll Reports or copy of check** showing payments to individuals (proof of payment)
- Student Sign-in Sheets** for tutoring or support services
- Contract Copy** (e.g., tutoring contract), when available

### Materials and Supplies

- Quote and/or Purchase Order** (initiation of cost)
- Invoice or receipt** (proof of cost)
- Receipt, copy of check and/or P-card report** (proof of payment)
- Student Sign-in Sheet** if materials and supplies are for an event
- Agenda** if materials and supplies are for an event

### Consultants and Contracts

- Quote and/or Purchase Order** (initiation cost)
- Invoice or receipt** (proof of cost)
- Receipt, copy of check and/or P-card report** (proof of payment)
- Student Sign-in Sheet** if the consultant is part of an event
- Agenda** if materials and supplies are for an event

### Staff Travel

- Travel Pre-Approval Paperwork**
- Travel Reimbursement Paperwork** (include all receipts, maps, etc. included)
- Proof of payment** to individual receiving reimbursement

### Student Travel

- Quote and/or Purchase Order** (initiation cost)
- Invoice or receipt** (proof of cost)
- Receipt, copy of check and/or P-card report** (proof of payment)
- Student Sign-in Sheet**
- Trip agenda**

\*Please note that all services data must be entered into SCRIBE before expenses will be reimbursed.\*

\*\*This form is a resource for schools and does not need to be turned in as a part of the reimbursement packet.\*\*

# Policies and Procedures Manual

APPENDIX I: GEAR UP Virginia In-kind Contribution Form



## GEAR UP Virginia (GUV) 2021-2028 In-kind Contribution Form

Division Name: \_\_\_\_\_ School Name: \_\_\_\_\_ Reporting Period: \_\_\_\_\_

Date of Contribution	Description of Contributed Items or Service	GUV-specific Purpose for Which Contribution Was Made	Name of Contributor Agency/ Business or Individual	Real or Approximate Value of Contribution	How was Value Determined? (i.e., Actual, Appraisal, Fair Market Value)
Example: 2/1/12	30 volunteer hours	Workshop planning and staffing	Various individuals (see volunteer logs)	\$977.70	30 hrs. @ 32.59/hr. = \$977.70 value of volunteer time per www.independentsector.org

By signing this form, I certify that the contributions listed above have been provided in support of the GEAR UP Virginia 2021-2028 grant objectives. Supporting documentation of contributions is attached, and originals are maintained by the school/district and will be made available upon request.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

