GEAR UP
LIAISON
QUICK GUIDE

MONTANA
LOCAL TEAMS

- Each school must have a local GEAR UP Team to provide services and planning.
- Each team must meet monthly.

WHO HAS TO BE ON THE TEAM?

- LIAISON
- ADMINISTRATOR
- SCHOOL COUNSELOR
- CORE SUBJECT TEACHER (I.E. MATH, ENGLISH, SCIENCE)
- PARENT
- STUDENT

MEETINGS MUST BE ENTERED MONTHLY IN GEARS
MONTANA GEAR UP AFFIRMS THAT:

All Montana students can gain the academic, financial, and social knowledge and skills necessary for post-secondary learning regardless of their economic background.
IMPLEMENTATION PLAN

1. ACADEMIC PERFORMANCE
   1.1 STUDENT PERFORMANCE IN MATHEMATICS
   1.2 STUDENT ACADEMIC PREPARATION FOR COLLEGE
   1.3 PROFESSIONAL DEVELOPMENT
   1.4 SCHOOL INITIATIVE

2. GRADUATION & ENROLLMENT
   2.1 INCREASE GRADUATION RATES OF GU STUDENTS
   2.2 ENROLLMENT RATES IN POST SECONDARY EDUCATION
   2.3 SCHOOL INITIATIVE

3. EXPECTATION & KNOWLEDGE OF PSE
   3.1 STUDENT EXPECTATIONS & KNOWLEDGE OF FINANCIAL AID & BENEFITS OF PURSUING POST SECONDARY EDUCATION
   3.2 FAMILY EXPECTATIONS & KNOWLEDGE OF FINANCIAL AID & BENEFITS OF PURSUING POST SECONDARY EDUCATION
   3.3 CULTURALLY-THEMED COMMUNITY EVENTS AND INITIATIVES
ANNUAL REQUIREMENTS

QUARTER 1 (SEPT 1-DEC 31)
- Enter Students & Teachers in GEARS
- Monthly: Enter Services, Team Meetings, WebEx
- Campus visits/surveys
- College Application week and FAFSA night
- Fall Meeting
- Start Tutoring, After school Programs
- Prepare for/begin ongoing assessments

QUARTER 2 (JAN 1-MARCH 31)
- Quarterly Report 1
- Monthly: Enter Services, Team Meetings, WebEx
- Regional Meeting
- Surveys of Educators, Parents, Students
- Feb. Enter student data/grades/enrollment
- Last Amendment for technology
- Summer IP/Budgets due

QUARTER 3 APRIL 1-JUNE 30
- Monthly: Enter Services, Team Meetings, WebEx
- Spring Planning Meeting
- Draft Implementation/Budget for following year
- Return on Investment Form (report and create)
- Quarterly Report 2 & 3
- Campus visits/surveys
- Enter Student Data/Grades
- Start of Summer programs/camps/surveys
- 1 Page Narrative for APR

SUMMER JULY 1-AUG 31
- Summer Programs/Camps/Surveys/Orientations
- Annual Fiscal Report Due

Ask School Grant Manager for complete calendar.
Required Student Data Items

1. **Demographic Information** (name, grade, gender, race, student ID)
2. Days of Unexcused Absences (#)
3. LEP Status (Yes/No)
4. IEP Status (Yes/No)
5. FOR Lunch (Yes/No)
6. Course Enrollment (In Math, Science, and English only)
7. Course Grade (Math, Science, English)
8. Course Completion (Yes/No)
9. Final GPA
10. Promotion to Next Year (Yes/No)
11. Graduating Seniors, did they graduate? (Yes/No). Post-Secondary plans?

- Due end of Sept.
- Due mid June
- Due in Feb.
GEAR UP is actively engaged in hearing from the people we serve. Our evaluator has created the following required annual surveys:

- **Parent Consent Form** (Complete as many as possible before March 1). This form allows students to be surveyed. Consider setting up at sports events and using concession donations to get parents to complete the survey.

- **Parent Survey** (Deadline April 1)*
  Goal: 50% completion

- **Teacher/Staff Survey** (Deadline May 1)*
  Goal: 80% completion

- **Student Survey** (Deadline: June 1)*
  Goal: 60% completion

*Can be completed online or paper
The following tests are planned and administered by the liaison and at least one other member from school's GEAR UP team. Prepare time/space for these required tests.

7th Grade - Tessera  
8th Grade - Aspire  
9th Grade - Tessera  
10th Grade - Pre-ACT  
11th Grade - ACT  

Please ask for the web location of video tutorials for setting up and implementing these testing services at your school.

Dates will be announced during WebEx meetings.
REQUIRED SERVICES

When building an implementation Plan, please include the following requirements:

• Graduation coaching, services to monitor at-risk students, and services to promote courses of study
• Tutoring
• College Application Week
• FAFSA Night Event
• College Signing Day
• GU Team Meetings
• Purposeful College Visits/STEM Trips
• Assessment Services for students and parents to frame mandatory assessments (Tessera, Aspire, Pre ACT, ACT)
• Supports for students in transitional years (7th, 9th and 1st year college students.)
Student Services

For Full Details See Services Cheat Sheet in GEARS

1. Tutoring

Record by subject area: Math, Science, English, Reading, Other

2. Mentoring

Must include financial aid information, encouragement to stay in school, enroll in rigorous course work, and apply for higher education.

3. Financial Aid Counseling & Advising

Assistance understanding and navigating the complexities of financial Aid (In person or virtual).

4. Counseling & Advising; Academic/Career Planning

Individual or small group-helping students grow, make choices about classes, colleges, or career interests.

5. College Visit/College Student Shadowing

An official tour, meeting with reps from financial aid, academic departments, residence life, or when a HS or MS student shadows a college student for a day; may also be virtual.
Student Services
For Full Details See Services Cheat Sheet in GEARS

6. JOB SITE VISIT OR SHADOW

Students visit a work site to witness first hand work environment and learn what training is required.

7. EDUCATIONAL FIELD TRIP

An activity where students go offsite to learn more about what is being studied in the classroom; record by subject area Math, English, Reading, Science, Other.

8. WORKSHOPS

Interactive, hands-on sessions for groups focused on topics related to academic success or college awareness.

9. RIGOROUS CURRICULA

Core subject classes aligned with college-based curricula that prepare students for post-secondary education.

10. ACADEMIC ENRICHMENT

Educational activities to augment or enhance student learning that don’t fit elsewhere. Should rarely be used.

11. FAMILY EVENT

Services where students and their family participate in recognition of the important role of family in student success; not defined under other services.
Parent Services

For Full Details See Services Cheat Sheet in GEARS

1. COUNSELING & ADVISING

In Person or Virtual: individual or group advising for parents/guardians to discuss their student’s academic goals, college plans, or school progress.

2. COLLEGE VISIT

An official tour, meeting with reps from financial aid, academic departments, residence life; may also be virtual.

3. WORKSHOPS

Parent or guardian attendance at a workshop that helps them assist their student with college preparation or financial aid information.

4. FAMILY EVENT

These services involve parents and families not defined elsewhere.

Teacher/Staff Services

1. GEAR UP TEAM MEETINGS

Meetings with a minimum of two people for the purpose of planning and collaboration on behalf of GEAR UP students, parents, or goals. Reference page 1 for required team members.

2. PROFESSIONAL DEVELOPMENT

Conferences, workshops, training-where methods, strategies, and best practices are shared- GEAR UP may pay for these, if they are related to GEAR UP goals and objectives.
DOCUMENTING SERVICES

Step 1. Add the service to your IP; if it is not in your IP it won’t count.
Step 2. During the service use a SIGN IN SHEET.
  • Date
  • Name of the service
  • How long the service lasted
  • Retain sign in sheets for your records
Step 3. Enter the services in GEARS by the 10th of the month.

Tutoring is Documented by Subject: Science, English, Math, Reading, Other

Count only the time on campus for College Visits; Do not count the travel unless you are teaching while traveling.
Budget Categories

The state will not reimburse for expenses that are not in an approved budget. It will not reimburse requests made after the fact.

For more information see TAM Section 2

<table>
<thead>
<tr>
<th>Expense Categories and Associated Acronyms Used in the IP</th>
<th>Expense Category</th>
<th>Acronym</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Services</td>
<td>PS</td>
<td></td>
<td>Salary, Benefits, Health Insurance, Stipends for staff</td>
</tr>
<tr>
<td>Contracted Services</td>
<td>CSV</td>
<td></td>
<td>Nonemployee Chaperones, Consultants, On-site Trainers,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Professional Speakers, Stipends for Non-staff</td>
</tr>
<tr>
<td>Consumable Supplies</td>
<td>CSP</td>
<td></td>
<td>Incentives, food used when not traveling, Books for AP</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>classes, Calculators, Office supplies</td>
</tr>
<tr>
<td>Student Travel/college visits</td>
<td>CV</td>
<td></td>
<td>Food, Mileage, Lodging, Registration or Entry Fees</td>
</tr>
<tr>
<td>Staff Travel/Professional Development</td>
<td>PD</td>
<td></td>
<td>Food Per Diem, Lodging, Mileage, Registration Fees, Baggage</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>fees, shuttles</td>
</tr>
<tr>
<td>College Application Fees</td>
<td>CAF</td>
<td></td>
<td>College Application Fees</td>
</tr>
<tr>
<td>AP/Dual Enrollment</td>
<td>AP</td>
<td></td>
<td>Enrollment Fees, Placement Testing Fees</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(After 1, 2, Free is exhausted)</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
<td></td>
<td>Software Licenses, Honoraria</td>
</tr>
</tbody>
</table>
Budget Requests must be tied to an allowable service. Here is a guide to help.

**Allowable**
- The ask is allowable according to the TAM, state/federal rules
- Service clearly meets one of the 3 GU objectives
- There is evidence of the school's buy-in (i.e. match/cost sharing)
- If the purchase ties in with existing curriculum and has evidence of consistent use
- Cost per person is reasonable
- Services that clearly meet GU objectives: tutoring, college visits, STEM activities, college fairs, or advising (graduation coaching)
- Professional development for teachers that aligns with GU objectives

**Questionable**
- Participation is limited by GPA/Attendance
- High cost per student
- Tie to GU objective is weak
- Little evidence of investment by the school or participants
- High cost, one-time event, with no follow-up with students
  - Note: Many questionable services can be strengthened to move toward the green zone by identifying how the service/purchase ties to GEAR UP objectives (or an existing curriculum or teaches financial literacy, or rigorous curriculum, or advising, or mentoring). Examples would be lifeskills and leadership training.

**Unallowable**
- If it is deemed entertainment (ropes courses, theme parks, escape rooms, etc.)
- Unallowable under federal or state guidelines
- It is required of the schools by federal or state regulations
- Requesting after the service has already been completed
- Not reasonable ("headline" test)
- Exceeds the TAM's cost limits
- If there is a safety concern
- Educational opportunity that targets one student & is not available to other students
- Certificate programs that bypass post-secondary institutions & do not award college credit
- Career & Technical Education (It can be paid for by other sources)
- Professional development that is State-sponsorship cannot be added to a school's budget
Examples

Allowed...

- Museums
- Guided Tours
- PowWow
- Zoo/Wildlife Centers

Not Allowed...

- Movie/Film
- Concerts
- Plays/Theater
- Amusement Parks
- Sporting Events
- Escape Rooms
- Ropes Courses

Note: In cases where educational activities are integral to an event that occurs at a venue whose entry fees are considered unallowable for e.g. Silverwood Theme Park’s Physics Day, non-entry fee expenses (travel to Silverwood) may be allowed. In addition to the allowed activities, GEAR UP encourages the paring of college access programming with the allowed activities.
# Sample Budget

## Personnel Services

<table>
<thead>
<tr>
<th>GU ID</th>
<th>Implementation Plan Services</th>
<th>Description (Salary, Stipend/Hourly) + Benefits</th>
<th>Approved GEAR UP Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU100</td>
<td>All Services</td>
<td>(Jack Sparrow, full-time liaison) 1 FTE at an annual contracted salary of</td>
<td>$38,000.00</td>
</tr>
<tr>
<td>GU101</td>
<td>1.1 Student performance in Mathematics</td>
<td>(Shauna Pfaff, teacher) Stipend of $2,000 to be paid at end of the 13 weeks for time after the contract day running the robotic club. Stipends are paid on estimated, not actual hours worked.</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>GU102</td>
<td>All Services</td>
<td>(Juanita Tapia, Paraprofessional) Stipend to chaperone student travel $186.24 x 3 days. $186.24 to be paid upon completion of each trip. Stipend</td>
<td>$558.72</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GU ID</th>
<th>Personnel Benefits (Social Security, Medicare, Worker’s Comp Insurance &amp; Pension)</th>
<th>Approved GEAR UP Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU103</td>
<td>All Services</td>
<td>Sparrow’s benefits $38,000 x 16% = $6,080 \nPfaff’s benefits $2,000 x 16% = $320</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GU ID</th>
<th>Health Insurance Benefits</th>
<th>Approved GEAR UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU104</td>
<td>All Services</td>
<td>Sparrow’s health insurance 12 months x $877 per month</td>
</tr>
</tbody>
</table>

Sub Total: $57,572.12

## Operating Expenses

<table>
<thead>
<tr>
<th>GU ID</th>
<th>Contracted Services</th>
<th>Detailed Rationale and Cost Breakdown</th>
<th>Approved GEAR UP Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU107</td>
<td>1.3 Professional Development</td>
<td>1-day, onsite Texas Instruments Training provided by professional trainer Julia Robertson, for 25 staff</td>
<td>$1,900.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GU ID</th>
<th>Consumable Supplies</th>
<th>Detailed Rationale and Cost Breakdown</th>
<th>Approved GEAR UP Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>GU108</td>
<td>1.1 Student performance in</td>
<td>Snacks for afterschool tutoring $3 per 15 students x 4 days a week x 13 weeks = $2,340</td>
<td>$2,340.00</td>
</tr>
</tbody>
</table>

| GU ID  | 1.1 Student performance in | 7th Grade students will be provided TI 84+ CE model calculators in math classes. 28 calculators at $125 | $3,500.00             |

| GU ID  | 1.2 Academic Preparation for College | Testing Support (Pre ACT and ACT Testing Fall and Spring): 10 packs of pencils at $3.50 each = $35 \n$3 snacks x 150 students = $450 | $970.00             |

| GU ID  | 1.2 Advanced Placement (AP) | Books for AP classes 6 x $150 each | $900.00             |

| GU ID  | 2.1 Graduation rates of GEAR UP | After-school peer mentoring program: $1 snacks for 30 students x 1 day a week x 36 weeks | $1,080.00             |

| GU ID  | 1.1 Student performance in | 4 robotics kits @$350 each plus $300 misc. robotic supplies. | $1,700.00             |

<p>| GU ID  | 2.3 School Initiative | PREAPPROVAL REQUESTED 1 Laptop for data entry by Liaison @ $1200 \nSupplies for Liaison (Paper at $60, Toner $120, $50 Misc.) = $230 | $1,430.00             |</p>
<table>
<thead>
<tr>
<th>GU ID</th>
<th>Student Travel-College Visits</th>
<th>Detailed Rationale and Cost Breakdown</th>
<th>Approved GEAR UP Funds</th>
</tr>
</thead>
</table>
| GU114  | 1.1 Student performance in Mathematics              | Expanding Your Horizons Conference (5 students, 2 staff)  
(Meal rates are $8 B, $10 L, $18 D)  
7 people x $ 28 LD x 1 day = $196  
7 people x $36 BLD x 2 days = $504  
3 rooms @ $100 x 2 days = $600  
744 miles round trip x .545 = $405.48  
Registration 5 people x $30 = $150 | $1,855.48 |
| GU115  | 1.2 Student Academic Preparation for College        | Glacier National Park trip to study history and geology  
125 8th graders, 6 staff, 3 drivers  
134 people x $10 Lunch = $1340  
Tip 18% = $241 | $1581.00 |
| GU117  | 3.1 College and Career Awareness                    | College visit U of M, Missoula: 30 students + 2 staff  
Bus Mileage 690 miles roundtrip @ $1.80/mi = $1,242;  
Meals 32 ppl x $10L/$18D = $896  
Lodging 12 rooms @ $90/room = $1,080 | $3,218.00 |
| GU ID  | Staff Travel-Professional Development               | Detailed Rationale and Cost Breakdown                                                                 | Approved GEAR UP Funds |
| GU118  | 1.3 Professional Development                        | Montana School Counselor Association Conference: 1 staff  
Mileage 290 miles roundtrip Bozeman @ 0.58 = $168.20;  
Per Diem (2 Dinners @ $14.50) = $29;  
Lodging (1 night @ $90) = $90; Registration $150 | $437.20 |
| GU ID  | College Application Fees                            | Detailed Rationale and Cost Breakdown                                                                 | Approved GEAR UP Funds |
| GU119  | 2.5 College Application Week                        | College application fee 20 fees x $50 | $1,000.00 |
| GU ID  | AP/Dual Credit Fees                                  | Detailed Rationale and Cost Breakdown                                                                 | Approved GEAR UP Funds |
| GU120  | 1.3 Advanced Placement (AP)/Dual Enrollment        | AP exam fee: 12 students x $85 + $1020.00  
Tuition for GFC Dual Enrollment Math Classes  
12 Students X $172.02 for 2 classes $2064.24 | $3,084.24 |
| GU ID  | Other (Specify)                                      | Detailed Rationale and Cost Breakdown                                                                 | Approved GEAR UP Funds |
| GU122  | 2.1 Graduation Rates of GEAR UP Students            | Annual Licensing Fee for Odyssey Software for use in credit recovery $2750 | $2,750.00 |
| GU123  | 3.1 Student Expectations and Knowledge of           | Honorarium for guest speaker, Jake Gibson, for Speaking at Cat/Griz rally during FAFSA week event $250 | $250.00 |
| GU124  | All Services                                         | 5% or less of this total budget is set aside as reserves for service opportunities that may arise throughout the year, to be approved by the State office of GEAR UP | $2,500 |

**Operating Expenses Sub Total:** $30,195.92

Approved: (Date)  
By: (Name)  
Total Budget: $87,767.74
Review Section Two of the TAM for Spending Limits and Guidelines
Compiling a Fiscal Report

Please note that everyone should be entering match and services on a monthly basis. Whether you report monthly or quarterly, when you submit a fiscal report, please follow the following guidelines:

Please provide, in ONE email, the following attachments:

- Accounting Ledger
- Budget Tracking Sheet
- Matching Reports and Documentation
- Supporting Documentation for Actual Expenditures

These are suggestions for compiling a fiscal report:

**STEP ONE**
Enter your services in GEARS

**STEP TWO**
Update your expenditures into the Budget Tracking Sheet

**STEP THREE**
- Write the GU number on each expenditure supporting document (receipt, invoice, purchase order, time and effort certifications)
- Make a scan or photocopy of all expenditure supporting documents
- Give the original documents to your Clerk to retain for GU records
- Put all your copies of expenditure supporting documents into a file folder; these copies will be submitted with the report

**STEP FOUR**
- Gather your Supporting Documentation for Match (For each event gather: Volunteer Sign in sheets, Time and Effort Match Forms, In-kind forms, Bus driver records, substitute request forms, etc.)
- Enter the documents in GEARS
- Write the Match ID number assigned by GEARS on the corresponding documents
- Scan the original and place copies in a file; these copies will be submitted with the report

**STEP FIVE**
- Review the Budget Tracking Sheet with the clerk’s accounting ledger
- Identify and resolve any discrepancies
- When your records match the clerk’s records, attach the four (4) documents listed above and send via email
- Retain records in school file
Travel With Students

**MEALS & MILEAGE**

Food rates are higher for everyone when you have students with you.

1. Food is $8 for breakfast, $10 for lunch, $18 for dinner for students, chaperones, and the driver.
2. Save all receipts.
3. You can tip up to 18%.
4. If the school can provide one meal for a long day, that can be counted as match.
5. Mileage is reimbursed at .58; however if you have a local bus or van rate, you may use that.

Travel Without Students

**MEALS & MILEAGE**

Staff food rates and transportation costs are lower when you travel without students.

1. Food is $7.50 for breakfast, $8.50 for lunch and $14.50 for Dinner.
2. If a meal is provided you can not ask for reimbursement.
3. Reimbursement is based on how early you leave and how late you get back, and how long you were there.
4. Miles can be reimbursed at .58 per mile.
5. Carpooling is expected.

Out of State Travel may have different reimbursement rates and/or may require Federal Officer approval.
State-Sponsored Travel

3 CONFERENCES ARE STATE-SPONSORED

1. The Regional GEAR UP Conference in October
2. The Capacity Building Workshop in February
3. The NCCEP National Conference in July

NOTE:

You Apply to Attend These.

SPOTS ARE LIMITED.
Do not add to local budget.

Mileage is reimbursed at 0.27 per mile.

Travel for the Fall and Spring Meetings will come from your local budget.
Match

GEAR UP requires a 100% match
Whatever you spend you must "Match" $1 for $1

GEAR UP $$$$  Other Non Federal $$$$$

See TAM Section 3 for Full Guidance
## Types of Match

<table>
<thead>
<tr>
<th>Scholarships</th>
<th>Waivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial assistance designated for GEAR UP students.</td>
<td>The amount of tuition, fees, room, board waived or reduced for GEAR UP students (from tribal or community colleges only).</td>
</tr>
<tr>
<td>Type: Cash Match</td>
<td>Type: In-Kind</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cash</th>
<th>Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash donated to purchase materials, supplies, or services for a GEAR UP project.</td>
<td>The documented amount on the price of products or services that is waived or reduced for a GEAR UP project.</td>
</tr>
<tr>
<td>Type: Cash Match</td>
<td>Type: In-Kind</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time and Effort</th>
<th>Donated Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>The amount contributed in time, on GEAR UP services, by volunteers or paid staff.</td>
<td>The documented value of donated items such as equipment, supplies or use of facilities.</td>
</tr>
<tr>
<td>Type: In-Kind</td>
<td>Type: In-Kind</td>
</tr>
</tbody>
</table>
**Never Allowable to Count as Match:**

<table>
<thead>
<tr>
<th>Match already being counted for another Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding donated from another Federal Source (except for Impact Aid Funds)</td>
</tr>
<tr>
<td>Allowable match that occurred outside of this present grant period</td>
</tr>
<tr>
<td>Time and Effort of Military recruiters</td>
</tr>
<tr>
<td>Time and Effort from someone who is getting a stipend or gift for their contribution</td>
</tr>
<tr>
<td>Anything that would not be allowable under normal GU guidelines</td>
</tr>
<tr>
<td>Alta Care and Private Student counseling services</td>
</tr>
<tr>
<td>AmeriCorps or Vista volunteer’s time (they are federally funded)</td>
</tr>
<tr>
<td>Time and Effort from Talent Search and 21st Century staff</td>
</tr>
<tr>
<td>A certified <strong>teacher’s time</strong> during the contract day—even when GEAR UP related</td>
</tr>
<tr>
<td>A <strong>school counselor’s time</strong> during the contract day if they are a certified staff.</td>
</tr>
<tr>
<td>A <strong>school counselor’s time</strong> on activities that would be occurring in the absence of GEAR UP</td>
</tr>
<tr>
<td>A <strong>paraprofessional’s time</strong> if they would be doing their job because it is required by State or Federal Regulations</td>
</tr>
<tr>
<td>Discounts that are offered to everyone (BOGO; 20% sale)</td>
</tr>
<tr>
<td>Supplies donated to the school for general use without a direct link to GU: Ask “Would these donations have occurred without GU?”</td>
</tr>
<tr>
<td>School expenditures to buy equipment that it would buy in the absence of GEAR UP.</td>
</tr>
<tr>
<td><strong>Bus expenses for normal</strong> pick up/delivery, including for after school drop off</td>
</tr>
</tbody>
</table>
## Allowable to Count as Match

<table>
<thead>
<tr>
<th>Allowable to Count as Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of IT costs associated with use of inventoried computer electronics that GU students use, IT salaries related to maintenance, and operating budget</td>
</tr>
<tr>
<td>Impact Aid Funds of Bureau of Indian Education funds that are contributing to specific GEAR UP activities and are allowable under all other grant guidelines for GU-related activities</td>
</tr>
<tr>
<td>Indirect costs - if your school has an indirect cost agreement with OPI</td>
</tr>
<tr>
<td>Scholarships for previous year’s GU graduates</td>
</tr>
<tr>
<td>Fee Waivers from Community or Tribal Colleges</td>
</tr>
<tr>
<td>Use of space - at your school and at other locations for GU services</td>
</tr>
<tr>
<td>% of custodial and custodial operating budget based on GU regular on-going use of space</td>
</tr>
<tr>
<td><strong>Administrator’s time</strong> (Principals, Superintendents) doing GEAR UP activities - Going to GU activities, Taking GU issues to the Board</td>
</tr>
<tr>
<td><strong>Administrative Staff time</strong> during work that directly contributes to GU activities in the IP or are required by GU (for e.g. clerks time preparing fiscal reports)</td>
</tr>
<tr>
<td><strong>Teacher’s time</strong> beyond the contract day - if it is GU related or relates to a Professional Development opportunity that directly benefits and ties back to the GEAR goals such as travel time and travel costs if not paid from GU grant.</td>
</tr>
<tr>
<td><strong>A school counselor’s time</strong> when engaged in GU Activities - if they are designated as an administrator or if she/he is classified as a certified counselor and the time engaged in GU activities is after their contract day</td>
</tr>
<tr>
<td>Substitute teacher’s pay while teacher is on a GU event when GU is not paying for the substitute</td>
</tr>
<tr>
<td><strong>A paraprofessional’s time</strong> if the position exists to support GEAR UP Goals, or a portion of their time if significant tasks are carried out in support of GEAR UP objectives and the duties are part of the current Implementation Plan and their work is not required by licensing, State or Federal regulations.</td>
</tr>
<tr>
<td>Discounts that are GU specific - You asked for a GU discount.</td>
</tr>
<tr>
<td>Student time volunteering as interns for GEAR UP tasks</td>
</tr>
<tr>
<td>Student jobs paid by the school who do GEAR UP tasks</td>
</tr>
<tr>
<td>Bus expenses if added on to cover GU services exclusively (e.g. for after school tutoring)</td>
</tr>
</tbody>
</table>
Consult Section Three of the TAM on How to Document Match
We sincerely appreciate all you do for Montana students

- GEAR UP Team