

TABLE OF CONTENTS

Table of Contents	i
Section 1: GEAR UP Program Administration	1
1.1 Montana GEAR UP Mission Statement and Program Overview	1
1.1.1 Montana GEAR UP Schools.....	2
1.1.2 Montana GEAR UP Organizational Chart	3
1.1.3 What can a school expect from Montana GEAR UP?.....	3
1.1.4 What will Montana GEAR UP expect from a school?.....	4
1.2 Montana GEAR UP Annual Timeline*.....	5
1.3 Montana GEAR UP Goals, Objectives, and Measures.....	6
1.3.1 GOAL 1: Increase the academic performance and preparation for postsecondary education of GEAR UP students.....	6
Objective 1.1: Student Performance in Mathematics (Required Objective).....	6
Objective 1.2: Student Academic Preparation for College (Required Objective).....	6
Objective 1.4: School Initiative	7
1.3.2 GOAL 2: Increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students	7
Objective 2.1: Graduation Rates of GEAR UP Students (Required Objective)	7
Objective 2.2: Enrollment Rates in Postsecondary Education (Required Objective).....	7
Objective 2.3: School Initiative	7
1.3.3 GOAL 3: Increase student and family education and knowledge of financial aid	8
Objective 3.1: Student Expectations and Knowledge of Financial Aid (Required Objective) ..	8
Objective 3.2: Family Expectations and Knowledge of Financial Aid (Required Objective)...	8
Objective 3.3: School Initiative	8
1.4 Montana GEAR UP Implementation Plan (IP)	8
1.4.1 Development.....	12
Planning	12
Approval.....	13
1.4.2 Reporting.....	13
Services	13
Progress Reports	14
1.5 Montana GEAR UP Local Management Team	14
1.5.1 Local Management Team Responsibilities	15
Planning.....	16
Implementation	16
Monitoring/Reporting.....	16
1.6 Montana GEAR UP Liaison	16
1.6.1 Required Duties of a GEAR UP Liaison.....	17

SECTION 1: GEAR UP PROGRAM ADMINISTRATION

1.1 Montana GEAR UP Mission Statement and Program Overview

Montana GEAR UP (*Gaining Early Awareness & Readiness for Undergraduate Programs*) believes that all Montana students can gain the academic, financial, and social knowledge and skills necessary for postsecondary learning, regardless of their economic background. Montana GEAR UP provides schools, students, families, and communities with resources and experiences that empower students to complete high school and attain postsecondary and career success. Montana GEAR UP brings this message through early college and career awareness activities, financial aid information, improved academic support, and social-emotional learning strategies that focus on the whole student, raising the expectations and achievement of all.

In September 2017 the U.S. Department of Education (DOE) awarded the Office of the Commissioner of Higher Education a seven-year GEAR UP grant for the state to increase the number of students in low-income communities who are prepared to enter and succeed in postsecondary education. This is Montana's fourth state GEAR UP grant.

Montana GEAR UP partners with 18 middle schools and their receiving high schools from around the state to improve high school graduation and college enrollment rates. Montana GEAR UP serves students in grades seven through twelve, as well as grade thirteen (i.e., college freshmen or "7th year" students). The services of GEAR UP are many and include support for Advanced Placement, dual enrollment, STEM opportunities, ACT's College and Career Readiness System (8th and 10th grade Aspire and ACT tests), professional development, dropout prevention, mentoring, supports to improve non-cognitive skills, transition services, college and career awareness, financial aid information, parental engagement, and student advisement. Montana GEAR UP also supports state and local summer programs.

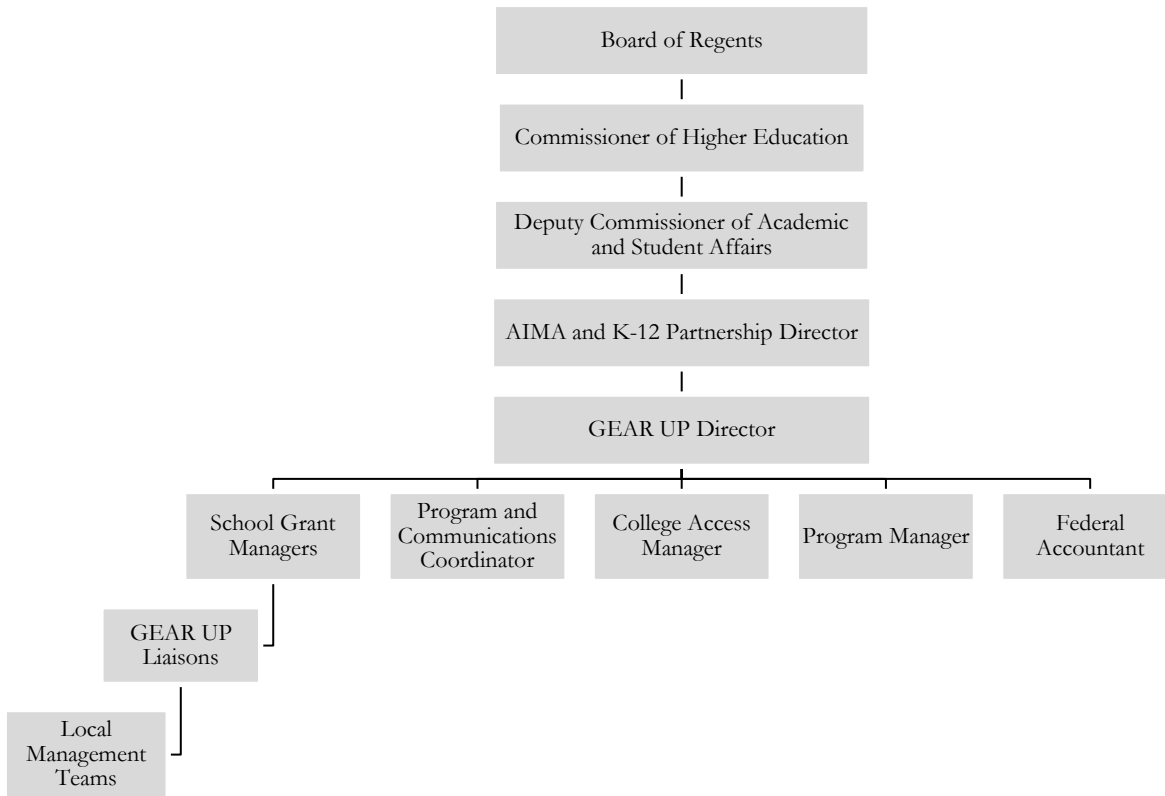
GEAR UP in Montana is not a one-size-fits-all program. Upon approval, Montana GEAR UP schools receive a sub-grant from the state office to implement their plan and services. Using school specific data, each school evaluates their unique strengths and needs to develop a plan of services that addresses GEAR UP goals and objectives. To maximize the benefit and effectiveness of GEAR UP, a local school management team consisting of at least a school administrator, counselor, GEAR UP liaison, core content teacher, student, and parent will develop the school's tailored program in collaboration with the Montana GEAR UP school grant manager (SGM). Other key personnel should be encouraged to participate on the GEAR UP team.

1.1.1 Montana GEAR UP Schools

School	Region	School Grant Manager
Arlee MS/HS	Western	Karen Wilson
Box Elder MS/HS	Eastern	Karen Wilson
Browning MS*	Western	Karen Wilson
Browning HS*	Western	Karen Wilson
Hardin MS*	Eastern	Karen Wilson
Hardin HS*	Eastern	Karen Wilson
Harlem MS/HS	Eastern	Karen Wilson
Hays-Lodge Pole MS/HS	Eastern	Karen Wilson
Heart Butte MS/HS*	Western	Karen Wilson
Lame Deer MS/HS	Eastern	Karen Wilson
Libby MS/HS	Western	Karen Wilson
Lodge Grass MS/HS*	Eastern	Karen Wilson
Pryor MS/HS	Eastern	Karen Wilson
Rocky Boy MS/HS	Eastern	Karen Wilson
St. Ignatius MS/HS*	Western	Karen Wilson
St. Regis MS/HS	Western	Karen Wilson
Superior MS/HS	Western	Karen Wilson
Thompson Falls MS/HS	Western	Karen Wilson
Troy MS/HS	Western	Karen Wilson
Wyola MS/HS	Eastern	Karen Wilson

**ETS school*

1.1.2 Montana GEAR UP Organizational Chart



1.1.3 What can a school expect from Montana GEAR UP?

- A Memorandum of Agreement outlining commitments of both Montana GEAR UP and the school.
- An annual and summer sub-grant to operate the school's local GEAR UP program.
- A SGM assigned to work closely with the school and serve as a school's main point of contact with the Montana GEAR UP state team.
- Guidance, resources, support, and technical assistance in the implementation and operation of GEAR UP at the school.
- Technical assistance in completing program, fiscal, and match reports.
- Technical assistance in entering data into GEARS (Montana GEAR UP's online data management system).
- School-specific performance information from the outside evaluator (TBD) for Montana GEAR UP.
- One or two school visits each year from assigned members of the state team.
- Coordination with the Montana GEAR UP college access manager for financial aid guidance and deadlines for GEAR UP students and families.
- ACT's College and Career Readiness System assessments and results.
- State-sponsored summer academic enrichment programs for students.

- Professional development opportunities, including but not limited to the Montana College Access Network (MCAN) conference and Montana School Counselor's Association (MSCA) spring conference.

1.1.4 What will Montana GEAR UP expect from a school?

- Commitment to utilize and support a GEAR UP local management team to implement goal-driven GEAR UP services with fidelity and provide leadership in preparing students to be college and career ready. The team must meet at least monthly and include a school administrator, counselor, GEAR UP liaison, core content teacher, student, and parent. SGMs will use GEARS service entries to verify that team meetings are occurring monthly and that core team members are attending meetings regularly. Monthly meeting minutes must be documented and may be requested by state staff.
- Designation of a lead staff person to serve as the GEAR UP liaison. The liaison is the primary contact for the state GEAR UP office on day-to-day program operations. The liaison is required to attend state liaison meetings and provide feedback to state staff in a timely manner.
- Attendance by the GEAR UP local management team at the annual Spring Planning Meeting to develop an Implementation Plan (IP) and budget.
- Completion of an IP and budget, as well as submission of mid-year and final year program reports and quarterly and final fiscal reports by assigned deadlines (see GEAR UP calendar).
- Collection of required school-specific data, to be entered into GEARS for analysis and data sharing.
- Administration of GEAR UP surveys to students, parents, and educators.
- Commitment to match GEAR UP sub-grant award funds dollar-for-dollar. This match may be in the form of an in-kind contribution.
- Tracking of GEAR UP graduates' postsecondary plans.

Finally, by accepting GEAR UP funds schools agree to the responsibilities and provisions outlined in the Montana GEAR UP Memorandum of Agreement signed in Year 1 of the grant.

1.2 Montana GEAR UP Annual Timeline*

Quarter	Quarterly Tasks	Month	Monthly Tasks	Notes
Update Services / IP Progress Report in GEARS MONTHLY		10th	GEAR UP Year	<ul style="list-style-type: none"> • Annual Grant: 9/1-6/30 • Summer Grant 6/1-7/31
FALL	<ul style="list-style-type: none"> • School year IP and budget approved by state GU team • Fall Liaison Meeting (usually held during GU West regional conference) • GU West Regional Conference • ACT Aspire (8th and 10th grade) testing window • Student/staff data updated in GEARS • School site visit from state team member • Montana College Application Week (CAW) 	Sep	<ul style="list-style-type: none"> • GU year/annual grant award period begins • Update 8-12th Grade Student Data and Educator Data in GEARS 	<ul style="list-style-type: none"> • September 1
		Oct	<ul style="list-style-type: none"> • Review/Updates 7th Grade Student Data in GEARS • GEAR UP West Regional Conference 	
		Nov		
WINTER	<ul style="list-style-type: none"> • State summer camps announced • Educator survey opens in January and closes end of February 	Dec		
		Jan	<ul style="list-style-type: none"> • Local Summer Program planning • Winter Liaison meeting • Mid-Year IP Progress Report • 1st/2nd Quarter Fiscal Report 	
		Feb	<ul style="list-style-type: none"> • Budget amendments due for equipment/ technology/ license purchases • Student performance data for 1st semester due in GEARS 	<ul style="list-style-type: none"> • Last weekday in February
SPRING	<ul style="list-style-type: none"> • ACT Test administered to all public high school juniors – Mar/Apr • State summer camp applications disseminated and due 	Mar	<ul style="list-style-type: none"> • Local Summer program proposals due 	<ul style="list-style-type: none"> • Last Friday of Month
		Apr	<ul style="list-style-type: none"> • APR for DOE • MSCA Conference • 3rd Quarter Fiscal Report 	<ul style="list-style-type: none"> • Due APRIL 15 • Due APRIL 30
		May	<ul style="list-style-type: none"> • Spring Planning meeting • Draft IP and Budgets due 3rd Wednesday in May • Budget amendments due for non-equipment/ technology/ license purchases 	
SUMMER		Jun	<ul style="list-style-type: none"> • Summer grant award period begins • Annual grant award period ends • Final student performance data entered in GEARS; second Friday in June • Final IP progress report due 	<ul style="list-style-type: none"> • Starts JUNE 1 • Ends JUNE 30 • Due JUNE 30
		Jul	<ul style="list-style-type: none"> • Summer grant award period ends 	<ul style="list-style-type: none"> • Ends JULY 31

		Aug	<ul style="list-style-type: none"> • Final Fiscal Report Due • Summer IP Progress Report due • Summer Fiscal Report • GEARS Rollover of Data – System Closed for Data Entry 	<ul style="list-style-type: none"> • 1st Business Day in August • 1st Business Day in August • 1st Business Day in August • AUGUST 15 – 22
--	--	-----	---	---

**See GEAR UP calendar for specific dates and deadlines*

1.3 Montana GEAR UP Goals, Objectives, and Measures

The three goals of Montana GEAR UP and the objectives and measures associated with each goal are presented below. Montana GEAR UP has aligned its three goals to DOE’s GEAR UP objectives. The indicators or measures specified under each objective are a combination of Government Performance and Results Act (GPRA) measures, DOE GEAR UP Program Office measures, Montana GEAR UP (MTGU) project-specific measures (collectively referred to as “state measures”), and Competitive Priority (CP) measures and are labeled as such. One quick note, with the exception of the MTGU project-specific measures, all performance measures were mandated by DOE as a requirement of the grant application. Reasonable annual percentage increase determinations for each measure will be informed by available OPI and MUS data on the 18 GEAR UP schools in the 2017 grant as well as by data on the 2005 and 2011 grant performance measures. Baselines and goals will be set during the second year of the 2017 grant. *Note: For required objectives, schools must provide services until state measure(s) are met or exceeded.*

1.3.1 GOAL 1: Increase the academic performance and preparation for postsecondary education of GEAR UP students

Objective 1.1: Student Performance in Mathematics (Required Objective)

State Measures:

- 1.1.1** Students passing Pre-Algebra by the end of 8th grade will increase by X% each year of the grant until reaching XX% (GPRA)
- 1.1.2** Students passing Algebra 1 by the end of 9th grade will increase by X% each year of the grant until reaching X% (GPRA)
- 1.1.3** Students taking two years of post-Algebra 1 math by the end of 12th grade will increase by X% each year of the grant (GPRA)
- 1.1.4** Students scoring proficient or above on state math achievement tests in 8th grade will increase by X% each year of the grant (Smarter Balanced Assessments) (MTGU)

Objective 1.2: Student Academic Preparation for College (Required Objective)

State Measures:

- 1.2.1a** The percent of students who meet or exceed the College Readiness Benchmark on the ASPIRE in grade 8 in Math will increase by X% each year of the grant (MTGU)
- 1.2.1b** The percent of students who meet or exceed the College Readiness Benchmark on the ASPIRE in grade 8 in English will increase by X% each year of the grant (MTGU)
- 1.2.1c** The percent of students who meet or exceed the College Readiness Benchmark on the ASPIRE in grade 10 in Math will increase by X% each year of the grant (MTGU)
- 1.2.1d** The percent of students who meet or exceed the College Readiness Benchmark on the ASPIRE in grade 10 in English will increase by X% each year of the grant (MTGU)

- 1.2.1e** The percent of students who meet or exceed the College Readiness Benchmark on the ACT in grade 11 in Math will increase by X% each year of the grant (MTGU)
- 1.2.1f** The percent of students who meet or exceed the College Readiness Benchmark on the ACT in grade 11 in English will increase by X% each year of the grant (MTGU)
- 1.2.2** Percent of students who acquire non-cognitive skills, measured on ACT Tessaera Survey will increase by X% each year of the grant (CP)

Objective 1.3: Professional Development (Required Objective)

State Measures:
No state measures

Objective 1.4: School Initiative

State Measures:
No state measures

1.3.2 GOAL 2: Increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students

Objective 2.1: Graduation Rates of GEAR UP Students (Required Objective)

State Measures:

- 2.1.1** Students on track for graduation at the end of each grade will increase by X% each year of the grant (GPRA)
- 2.1.2** Students graduating from high school will increase by X% each year of the grant (GPRA)

Objective 2.2: Enrollment Rates in Postsecondary Education (Required Objective)

State Measures:

- 2.2.1** 11th grade students on track with the MUS college preparatory curriculum will increase by X% each year of the grant (MTGU)
- 2.2.2** Educators believing their students will obtain some college education will increase by X% each year of the grant (MTGU)
- 2.2.3** Students who are enrolled in college will increase by X% each year of the grant until reaching XX%
- 2.2.4** Students placing into college-level Math without need for remediation will increase by X% each year of the grant (GPRA) (NOTE: based on MUS only)
- 2.2.5** Students placing into college-level English without need for remediation will increase by X% each year of the grant (GPRA) (NOTE: based on MUS only)
- 2.2.6** Current and former GEAR UP students enrolled in college who are on track to graduate college will increase by X% each year of the grant until reaching XX% (GPRA) (NOTE: based on MUS & out-of-State, non-tribal colleges only)

Objective 2.3: School Initiative

State Measures:
No state measures

1.3.3 GOAL 3: Increase student and family education and knowledge of financial aid

Objective 3.1: Student Expectations and Knowledge of Financial Aid (Required Objective)

State Measures:

- 3.1.1** Students completing the FAFSA will increase by X% each year of the grant (GPRA)
- 3.1.2** Students demonstrating knowledge of available financial aid and the costs and benefits of pursuing postsecondary education will increase by X% each year of the grant (5pt scale from No Knowledge to Extremely Knowledgeable) (GPRA)
- 3.1.3** Students expecting to go to college will increase by X% each year of the grant or until reaching XX% (MTGU)

Objective 3.2: Family Expectations and Knowledge of Financial Aid (Required Objective)

State Measures:

- 3.2.1** GEAR UP parents/guardians actively engaging in activities associated with assisting students in their academic preparation for college will increase by X% each year of the grant (GPRA). (4pt scale from No Times to Often) (GPRA)
- 3.2.2** GEAR UP parents/guardians demonstrating knowledge of available financial aid and the costs and benefits of pursuing postsecondary education will increase by X% each year of the grant (5pt scale from No Knowledge to Extremely Knowledgeable) (GPRA)
- 3.2.3** GEAR UP parents/guardians expecting their child to go to college will increase by X% each year of the grant until reaching XX%

Objective 3.3: School Initiative

State Measures:

No state measures

1.4 Montana GEAR UP Implementation Plan (IP)

IPs are intended to guide the local implementation and reporting of GEAR UP services at GEAR UP schools. For simplicity, the following section discusses the IP as it relates to annual school programming; however, it should be noted that the IP is also used to guide local summer program implementation and reporting. For summer planning timelines and reporting deadlines, please reference the GEAR UP calendar.

- The IP is aligned with and organized by Montana GEAR UP's goals. The following table is a guide as to where activities would best fit based on the GU Objective. Use of this table is encouraged so that across the State schools are consistent in laying out their plans. Note that objective 1.1 is primarily about rigorous math, and 1.2 is about the other rigorous STEM courses. Objective 2.1 is about helping prevent drop out, helping students catch up, and all tutoring that is not rigorous (Rigorous tutoring would be to help students pass advance placement or dual enrollment classes), should go under 2.1.

Table 1-2 How Activities Align with GU Goals

GOAL 1: Increase the academic performance & preparation for postsecondary education of GEAR UP students

Objective: 1.1 Student Performance in Mathematics

Suggested Service Categories	Examples of Services
Math/STEAM tutoring	<ul style="list-style-type: none"> • <u>Rigorous Math Tutoring</u> (in class and afterschool) Remember to report out tutoring by subject • Glacier Park STEAM Trips, with heavy math focus • AP Calculus classes • Math contests • Expanding Your Horizons • Robotics (Supplies, clubs, competitions) • Math supplies/calculators
Math/STEAM instruction and academic enrichment	
Math/STEAM competitions, field trips and workshops	
AP math and computer science tests (calculus, statistics, computer science, etc.); math assessments	
Evaluation/alignment of math courses	

Objective: 1.2 Student Academic Preparation for College

Suggested Service Categories	Examples of Services
English/reading, science, social sciences/studies and other tutoring	<ul style="list-style-type: none"> • <u>Rigorous tutoring for all classes except math</u> (in class and afterschool) Remember to report out tutoring by subject • Dual Enrollment: English, Science • Scholastic Subscriptions • Book Clubs • Science/chemistry Supplies • AVID Binders • Tessera, ACT, Pre ACT, ACT Testing and Prep for testing • National Park trips with focus on geology, history, fire fighting • Books for second language course • Science Olympiad • Art Supplies for academic enrichment
English/reading, science, social sciences/studies, and other instruction and academic enrichment	
English/reading, science, social sciences/studies, and other competitions, field trips and workshops	
AP arts, English, history, social science, science and language/culture tests; academic assessments (not math assessments)	
Evaluation/alignment of English/reading, science, social sciences/studies and other courses	
Non-Cognitive skill building in advisories and workshops	

Objective: 1.3 Professional Development

Suggested Service Categories	Examples of Services
Professional Development for staff	<ul style="list-style-type: none"> • Professional Development for staff that the State is not sponsoring • Note: Count number served as the number of staff going, (not the number of students in the school).

Objective: 1.4 School Initiative

Suggested Service Categories	Examples of Services
Initiatives related to improved academic performance or preparation for post-secondary education	<ul style="list-style-type: none"> • Initiatives related to improved academic performance or preparation for post-secondary education that don't fit above

GOAL 2: Increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students

Objective: 2.1 Graduation Rates of GEAR UP students

Suggested Service Categories	Examples of Services
Mentoring	<ul style="list-style-type: none"> • <u>After school tutoring for all classes that is provided to prevent students from falling behind or dropping out</u> • <u>Academic advising that is specific to preventing falling behind or dropping out</u> (Designate if it is parent or student; if both there must be two services) • Credit Recovery • Freshmen orientation, orientation to Junior High • Freshmen success packages • Graduation focused committees • Student leadership retreats/conferences • Jr High Reading Interventions • Graduation from 8th grade • Anything to improve attendance • Character Building • Parent teacher conferences • Hi Set for credit recovery
Student Recognition	
Student Promotion and Graduation events	
Prevention drop out initiatives	
Personal social counseling	

Objective: 2.2 Enrollment Rates in Postsecondary Education

Suggested Service Categories	Examples of Services
College orientation	<ul style="list-style-type: none"> • College application week/application fees • Senior Portfolios • 7th and 8th graders completing mock applications • College Freshmen gifts/visits
College application assistance	
College Application Week events	
7th year outreach and support	

Objective: 2.3 School Initiative

Suggested Service Categories	Examples of Services
Gear Up Team Meetings	<ul style="list-style-type: none"> • <u>Monthly Local Gear UP Team Meetings</u> • This is where to put liaison supplies like lap tops, toner, paper, pens, etc.
Initiatives designed to increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students	<ul style="list-style-type: none"> • Initiatives designed to increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students that do not fit under Objective 2.1, 2.2 above • Parenting Classes • Drug/Alcohol counseling • Suicide Prevention Activities/Awareness

GOAL 3: Increase GEAR UP student and family educational expectations & knowledge of postsecondary options, preparation and financing

Objective: 3.1 Student Expectations and Knowledge of Financial Aid and Benefits of Pursuing Postsecondary Education

Suggested Service Categories	Examples of Services
Academic planning and counseling	<ul style="list-style-type: none"> Each service here is for students only; If parents are involved there must be a matching parent service under 3.2 <u>Academic advising to help students choose classes that align with a chosen career or college field</u> FAFSA Night Help applying for Scholarships College Visits Job Shadowing Tracking progress toward graduation with students (Note: If students and parents are involved, there must be matching service under 3.2) Career Day College Student Panels Virtual job search
College visit and college student shadowing	
College workshops, fairs and counseling	
Career workshops, fairs and counseling; job shadowing/internships	
Family events	
FAFSA/financial aid/scholarship assistance and counseling	
Cultural events (unless clearly ties to another objective)	

Objective: 3.2 Family Expectations and Knowledge of Financial Aid and Benefits of Pursuing Postsecondary Education

Suggested Service Categories	Examples of Services
Academic planning and counseling	<ul style="list-style-type: none"> Each of these are for when a parent only is involved If the service involves both the parent(s) and student, there must be matching student service under 3.1 Newsletters with GEAR UP content
College workshops, fairs and counseling	
Career workshops, fairs and counseling; job shadowing	
Family events	
FAFSA/financial aid/scholarship assistance and counseling	
FAFSA/financial aid/scholarship assistance and counseling	
College visit and college student shadowing	
College orientation and 7th year outreach and support	
Cultural events (unless clearly ties to another objective)	

Objective: 3.3 School Initiative

Suggested Service Categories	Examples of Services
Initiatives designed to increase GEAR UP student and family educational expectations & knowledge of postsecondary options, preparation and financing	<ul style="list-style-type: none"> Activities that do not fit above in 3.1 or 3.2 All Culturally-themed initiatives or community events

Using school-specific data to align school need and services with GEAR UP goals, the IP for the upcoming school year is developed by the GEAR UP local management team in coordination with their assigned SGM at the annual Spring Planning Meeting (aka the “Implementation Plan Workshop”). Data are collected and analyzed via IP progress reporting throughout the school year to ensure integration of program services and to address gaps; therefore, the IP serves as both an on-going guide and a data-driven decision-making tool for implementation. A formal mid-year IP progress report allows local management teams to use their data to monitor progress toward state and local goals and make programmatic adjustments, as well as revise services as needed. An end-of-the-year final IP progress report allows local management teams to evaluate program outcomes and adjust goals and strategies accordingly.

Montana GEAR UP uses program objectives (see Section 1.3) in reporting to DOE to evaluate overall program effectiveness.

The budget for the upcoming school year is developed along with the IP and with a clear connection to services outlined in the IP. Furthermore, a school’s IP provides a framework for identifying other qualifying funding sources that can be used as match. **All services included in a school’s IP must be wholly or partially funded through a school’s local GEAR UP budget and/or have qualifying matching funds outlined.**

Ultimately, the IP will serve as an effective tool for local management teams to implement, monitor, and evaluate the GEAR UP program. Best practices and effective strategies for replication will be collected and shared in the school’s mid-year and final year IP progress reports and shared periodically at state GEAR UP meetings.

1.4.1 Development

The IP and budget are to be created online through the Montana GEAR UP data management system GEARS: <https://grant2.praed.net/mtgearup/>. Edits, revisions, comments, and final approvals will be tracked through GEARS. This process will be completed jointly by the SGM/state GEAR UP team and liaison/local management team.

Planning

The annual IP and budget are developed at the Spring Planning Meeting (aka “Implementation Plan Workshop”). (Note: Teams may require planning time before and beyond the Spring Planning Meeting.) To facilitate this process, GEAR UP SGMs provide an implementation planning guide and other tools as necessary for guidance, technical assistance, resources, and team support. Throughout the school year, GEAR UP local management teams collect and analyze school-specific data to identify needs and services. While it is not necessary for teams to implement a service(s) for each GEAR UP objective, a school’s IP should include services that address the specific needs of the school as well as required objectives for which state measures have not been met or exceeded (see Section 1.3).

Some questions to consider when determining whether to include a service in your school’s IP are:

- **Does this service align with the local GEAR UP team’s mission? (The team’s mission statement should be clearly stated on the IP and referred to often.)**
- **Does this service address local needs?**

- **Will this service help the school meet required/prioritized state and local GEAR UP measures and goals?** (All services included in the IP should be measurable. Services under objectives without state measures should have meaningful local measures outlined.)
- **How will GEAR UP funds and/or match funds be used to complete this service?** (All services included in a school's IP must be wholly or partially funded through a school's local GEAR UP budget or have qualifying matching funds outlined. IP services that list Match as a funding source must detail what will be used as match under Funding Notes; e.g., for a College Application Week service match might include "Match will be teacher's time beyond the contract day, assisting students with college applications." IP services that list Local GEAR UP Budget as a funding source must identify the resources required to implement the service under Funding Notes; e.g., for a college visit resources might include "liaison's time for chaperoning, bus mileage, and meals." Include the GU number assigned by the budget. Acronyms used for expense categories in the IP under Funding Detail are included in Section 2, **Table 2-1**.)
- **Can participants (i.e., students, parents, and/or staff) be identified for this service?** Services must be reported with participants identified. Session duration and number of sessions per participant are required for service reporting.

Local management teams will meet prior to the Spring Planning Meeting to identify their needs, clearly state their team's mission, brainstorm services, and determine funding priorities for the upcoming school year.

Local management team members are encouraged to solicit ideas for GEAR UP services from local stakeholders (e.g., community members, tribal members, parents, students, and teachers). A tool to facilitate idea sharing, the *Program Idea Sharing Worksheet*, is available on the GEAR UP website (<http://mus.edu/gearup/fiscal.asp>).

Approval

After the Spring Planning Meeting, local management teams will finalize their IPs and budgets and submit them in GEARS for state team review. (The deadline for submitting your draft IP and Budget is the **third Wednesday in May** and your final annual IP and budget is due **June 30**.) The SGM, along with the state GEAR UP team, will review the IP and budget and contact the school for any changes, clarifications, or additions needed. After all necessary revisions are complete, the SGM will approve the IP and budget. Approval documents will be sent to the local management team, pending approval of previous year reporting. The GEAR UP local management team will review approval documents and return a completed signature page (indicating their review and agreement) to the state office.

1.4.2 Reporting

Services

As services in your IP occur, they should be entered into GEARS (**at a minimum, entry should be completed on a monthly basis, by the 10th of the month**). The IP outlines service types and an approved plan for implementation and should be used to guide service entry. Services not included in a school's approved IP (e.g., services with match funding opportunities not anticipated during IP development), should be added to the IP so service data can be entered into GEARS and evaluated.

IP updates should be provided to SGMs on an ongoing and as-needed basis. Service cheat sheets available on the GEAR UP website (<http://mus.edu/gearup/fiscal.asp>) and in GEARS should be referenced to ensure all GEARS service entries are accurately coded and reported. **Note: State-funded services will be entered by state staff.**

To facilitate participant tracking for GEAR UP services, local management team members and other contributors to GEAR UP services have access to a service sign-in sheet, the *GEAR UP Service Attendance Record*, available on the GEAR UP website (<http://mus.edu/gearup/fiscal.asp>). Note: Separate attendance records, also available on the GEAR UP website, should be used to track tutoring services and local summer program services.

To facilitate service-level evaluation and expedite IP progress reporting,

- (1) local management team members and other contributors to GEAR UP services have access to an evaluation tool, the *Service Evaluation Worksheet*, available on the GEAR UP website (<http://mus.edu/gearup/fiscal.asp>); and
- (2) GEARS includes a service evaluation field in the IP that can be used to document team members' and/or other contributors' perceived service successes, challenges, and future opportunities (feedback would be provided to GEAR UP liaisons via worksheets or other means). Note: The text included in service entry evaluation fields will be used to populate IP progress reporting boxes at mid-year and year end.

Progress Reports

A mid-year IP progress report and final year IP progress report will be completed by the local management team and submitted to the GEAR UP state office (SGM) by the assigned deadlines. Once reports are approved, local management teams will be notified by email.

Quarterly and final fiscal reports (see Section 2 of this TAM) will be completed by the local management team and submitted to the GEAR UP state office (Federal Accountant) by the assigned deadlines. Once reports are approved, local management teams will be notified by email.

Program and fiscal data presented in progress reports will assist the GEAR UP local management team in their continued monitoring and evaluation of GEAR UP services, as well as inform the development of their next year's plan.

Please note, failure to complete required reporting (outlined in Table 1-1) as well as other grant requirements, may delay or prohibit reimbursement for awarded GEAR UP funds and will halt or prevent receipt of future GEAR UP funds.

Finally, please note that by accepting GEAR UP funds you are agreeing to the responsibilities and provisions outlined in the Montana GEAR UP Memorandum of Agreement signed in Year 1 of the grant.

1.5 Montana GEAR UP Local Management Team

Each GEAR UP school will form a local management team that believes that college is possible for all Montana students. The team will promote and lead the charge in developing a strong college going culture throughout the school and community. The team will implement goal-driven GEAR

UP services with fidelity and provide leadership in preparing students to be college and career ready. The GEAR UP local management team will consist of at least the following:

- administrator
- counselor
- GEAR UP liaison
- core content teacher
- student
- parent

Other key personnel (e.g., Educational Talent Search (ETS) if applicable, tribal leaders, school board members, community business members) are also encouraged to participate on the GEAR UP local management team.

Key members of the GEAR UP local management team (administrator, counselor, liaison, core content teacher) must attend the annual Spring Planning Meeting. ETS, parents, students, and other stakeholders are encouraged to attend as well.

Each school will be assigned a GEAR UP SGM who will support, advise, and provide resources to the team along with technical assistance in implementation. In addition, the SGM will conduct a school site visit at least once per year, coordinate conference calls with team members as needed,

and maintain ongoing communication with team members through phone and email. Additionally, each school will receive a second visit each year from their SGM or another member of the state team.

1.5.1 Local Management Team Responsibilities

Goal 1: Increase the academic performance and preparation for postsecondary education of GEAR UP students

- Provide academic advising to increase academic rigor and support
- Assist in the evaluation of course offerings and curricular improvement
- Promote and advance access of, opportunities for, and participation in rigorous coursework including AP and dual enrollment
- Monitor, track, and analyze student performance data and early warning indicators to promote on-time graduation and completion of the MUS college preparatory curriculum
- Coordinate the implementation of ACT's College and Career Readiness System
- Assist in professional development needs

Goal 2: Increase rate of high school graduation and enrollment in postsecondary education for GEAR UP students

- Build a strong college-going culture
- Facilitate/organize quality, research-based interventions and student support programs including tutoring, study skills, credit recovery, transition (middle school to high school and high school to college), and summer programs
- Coordinate school-based mentoring programs

Goal 3: Increase GEAR UP students' and families' knowledge of postsecondary education options, preparation, and financing

- Plan, coordinate, and organize college and career activities, such as college visits, career fairs, College Application Week, job shadow fairs, and student panels
- Provide grade-appropriate information about and preparation and planning services for career and college options
- Assist students and parents with financial aid, financial literacy, FAFSA, and college and scholarship applications
- Support and coordinate parental engagement efforts

Planning

The GEAR UP local management team works in coordination with their assigned GEAR UP SGM to develop an annual IP, along with an accompanying detailed budget, that meets Montana GEAR UP goals and the unique needs of the school. (Summer IPs and budgets and special project applications, if applicable, are also developed by local management teams in coordination with SGMs.)

Implementation

The GEAR UP local management team will meet at least once a month to carry out the IP. Members of the local management team will assist the GEAR UP liaison in implementing GEAR UP services. Team members' involvement and responsibilities will be outlined during the annual Spring Planning Meeting and guided by the strengths and availability of each GEAR UP local management team member. Other school staff should be encouraged to assist in implementing GEAR UP services.

Monitoring/Reporting

The GEAR UP local management team will provide ongoing evaluation of services for continuous improvement. The team members will monitor progress and effectiveness of services. Formal mid-year and final year program and fiscal reports will be completed by the team and submitted to the GEAR UP state office by assigned deadlines.

The GEAR UP local management team will support the liaison to complete the following duties:

- Administer the GEAR UP surveys to students, parents, and educators
- Participate in the required monthly WebEx meeting, if the Liaison is unavailable
- Utilize GEARS to enter, analyze, and share data
- Track graduates' postsecondary plans
- Attend GEAR UP liaisons' state meetings and provide feedback to state staff
- Complete required paperwork by assigned deadlines
- Gather GEAR UP match documentation throughout the year
- Monitor the GEAR UP budget

1.6 Montana GEAR UP Liaison

Montana GEAR UP requires each local management team to have an assigned GEAR UP liaison who may be funded through the local GEAR UP budget. Each school is required to have a minimum full time equivalent (FTE) for liaison work (e.g., 1.0 FTE, which is the equivalent of 40

hours per week; 0.5 FTE, which is the equivalent of 20 hours per week). Required FTEs are based on the school's 7-12th grade student enrollment and "reimbursement only" (high risk) status. FTEs above or below the required FTE for a school are allowable in certain circumstances and will be considered on a case-by-case basis.

1.6.1 Required Duties of a GEAR UP Liaison

All grant-funded work performed by liaisons must be sanctioned by the state office. Administrators and liaison/s must request approval for duties to be performed by liaison/s that are in addition to those outlined below. (Please refer to the GEAR UP calendar for set deadlines.)

PLANNING/IMPLEMENTING:

- Create/submit Implementation Plans (IP) and Budgets for state review by set deadlines
- Assist in planning State team site visits to school
- Submit budget amendment requests for equipment and/or non-equipment purchases by set deadline
- Receive prior approval from School Grant Manager for all amendments to the approved IP or Budget
- Plan, facilitate, and document monthly local GEAR UP team meetings
- Coordinate and implement student, guardian/parent, and teacher (staff) services as outlined in approved IP
- Plan and coordinate College Application Week, FAFSA Night, and College Signing Week services
- Coordinate student enrollment/attendance at state summer camps and college orientation sessions
- Respond to requests from the State within 5 business days; Promptly share GEAR UP information with local team

DATA:

- Review/update student, staff and guardian/parent data annually in GEARS by set deadline
- Review/update 7th grade students in GEARS, adding and transferring as necessary by set deadline
- Complete service entries in GEARS by the 10th of the month
- Complete service entries in GEARS upon completion of summer program (no later than deadline)
- Complete student, guardian/parent, educator, graduate, college visit and summer program surveys by set deadlines
- Complete Mid-Year and Final Year Implementation Progress Reports in GEARS by set deadline
- Complete student performance data for State GEAR UP Annual Performance Report by set deadline

FISCAL REPORTING:

- Submit annual, and summer grant acceptance documentation with required signatures to the state office by set deadlines
- Maintain and monitor approved budget against recorded expenditures in the school's

accounting system to ensure only approved and allowable expenditures are charged against the grant and match up with the services performed.

- Submit required documentation and reporting materials for expenditures (annual, and summer) by set deadlines
- Collect and Enter funding Match in GEARS monthly/annually *Dollar for dollar match must be entered in GEARS for all reimbursement requests
- Successfully complete quarterly and final fiscal reports by set deadlines
- “Reimbursement only” schools must request monthly reimbursement for completed services (include expenditure receipts, a current accounting ledger, and match documentation)

ASSESSMENTS:

- Act as the primary coordinator for ACT Aspire (Grade 8) and Tessaera (Grade 7, 9) assessments
- Ensure your high school participates in *both* Pre-ACT (Grade 10), and ACT (Grade 11)
- Facilitate ACT Aspire/Tessaera tasks as needed (uploading student data, creating tests sessions, etc.)

STATE EVENTS:

- Attend Fall Liaison Meeting
- Attend Regional Winter WebEx Meeting
- Attend Spring Planning Meeting (with team)
- Attend Monthly WebEx meetings (or coordinate a stand in if unavailable)

The recommended skills, knowledge, and abilities of the assigned GEAR UP liaison are as follows:

- Believes that college is possible for all students and is a resource for the school’s college-going culture
- Has or is able to develop a leadership role in the school
- Has experience in the socioeconomic, political, and cultural structures of the school and community
- Builds relationships with students, staff, parents, and community
- Has collaborative workplace experience and demonstrates history of positive teamwork
- Demonstrates strong ability to communicate, verbally and in writing, and is respected by school staff, students, and the community
- Applies program coordination skills including demonstrated record of completing tasks on time and within budget
- Exhibits knowledge of graduation requirements and postsecondary entrance requirements
- Demonstrates knowledge of postsecondary education options, preparation, and financing
- Holds a postsecondary credential

Recognizing that each school is unique, the above responsibilities may involve other staff within the school district based on skill sets, school needs, other duties assigned, etc.