

Rural Alaska GEAR UP Partnership



Lower
Kuskokwim
School
District



Guide for Reporting Matching Funds

for

Rural Alaska GEAR UP Partnership Grant

Developed by RGI Research Corporation

for

Lower Kuskokwim School District,
Bering Strait School District &
Alaska Staff Development Network

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Guide for Matching Funds

Rural Alaska GEAR UP

Introduction to GEAR UP

The **Rural Alaska GEAR UP Partnership** is a US Department of Education seven-year grant to provide students awareness and prepare them for postsecondary education. This partnership grant includes **Lower Kuskokwim School District (LKSD)** as the grantee, **Bering Strait School District (BSSD)**, **Alaska Staff Development Network (ASDN)** and **RGI Research Corporation**. The project will begin serving all students in grades 4-7 this 2017-2018 School Year and follow them for 7 years until graduation and first-year of college. This group of students is known as the GEAR UP Cohort of Students.

GEAR UP (GU) Partners have selected a range of research-based programs to increase the percentage of students taking rigorous and challenging courses. The partners will implement Project Lead the Way, STEM Ready, STEM focused programs and offer advanced courses for students. Advanced course development, dual enrollment and After School, Summer and Tutoring Programs will also be offered to support students' academic achievement in Math and Science. Students will also be provided a range of college-readiness activities including college information, assistance and workshops for students and parents on financial aid, scholarships, admission applications, SAT, financial literacy, campus visits and career exploration.

Introduction to Required Non-Federal Matching Funds

This federal US Department of Education grant requires that the partners provide “non-federal” or “matching funds” towards the grant. GEAR UP (GU) is required to provide a dollar-for-dollar match, meaning that for every dollar of federal grant funds spent on the project, it must collect an equal dollar amount of match in the form of state, local or donated funds. It is everyone's responsibility to collect and document this match with the utmost attention to accuracy, accountability and timeliness. If we do not meet the match requirement, we could have our federal grant funds reduced. Qualifying match contributions must be necessary to accomplish program activities, verifiable and allowable according to GEAR UP federal expenditure guidelines. Matching funds follows the same rules as the actual federal funds spent on GEAR UP services. Match must be allowable and reasonable.

Guide to Matching Funds

This Guide for Matching Funds provides instructions and forms for documenting and reporting matching funds by teachers, counselors, administrators, individuals, volunteers, businesses and other sources. The guide also includes sample forms to use as a reference. This guide and forms are also posted on the website www.rgicorporation.com. Furthermore, this guide provides the process for sending documents and forms to a centralized location for review, approval and archiving of all documentation and forms.

It is important that all matching funds are properly documented and that they meet all the federal requirements. These matching funds guidance is based on requirements and regulations for all federal programs found in OMB Circular A-110, OMB Circular A-21, Department of Education guidance, statutes, and Education Department General Administrative Regulations (EDGAR) in the collection of matching funds. This guidance from the Department of Education also includes presentations from GEAR UP department sponsored workshops offered at the National Conference and Meetings for Program Directors.

Guiding Principles for Identifying Matching Funds Contributions

The following guiding principles should be used when identifying and documenting matching funds for GEAR UP.

1. The contribution should be allowable as an expense under Office of Management and Business (OMB) guidelines and the GEAR UP Program. General guidelines can be referenced in OMB Circular A-21, OMB Circular A-110, and EDGAR section 74.23. Examples of items not allowable: personal donations of flowers, personal magazine subscriptions, tickets to sporting events or entertainment, tuition for teacher's or counselor's personal benefit, conferences not related to GEAR UP.
2. The volunteer effort is in direct support of GEAR UP objectives and activities described in this guide.
3. The contribution is necessary and reasonable for proper and efficient accomplishment of program objectives.
4. The contribution was not paid for by Federal funds from GEAR UP or any other federal program.
5. The donation or volunteer time is verifiable from the recipient's records.
6. The donation of volunteer teacher time is not being paid via contract time.

Definition of Match: Matching or Cash Matching Funds 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 goods or services paid for GEAR UP 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 GU activities. Examples of in-kind include work done by unpaid volunteers in support of GU and donations of supplies, facilities/space usage or equipment.

Sources of In-Kind

The following is a partial list and examples of commonly used sources of match/in-kind by other GU programs across the nation. It is not an exclusive list.

1. Teacher & Counselor Time

- Teacher/Counselor time **beyond** the contract day, in support of GEAR UP, counts as match. This includes planning time for GU classroom activities, substitute preparation when the teacher/counselor is chaperoning a GU trip, developing new rigorous lessons that support GU objectives, etc.
- All teacher/counselor 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/counselor.
- The teacher's/counselors normal hourly rate plus benefits is used to calculate their value.
- Teacher/Counselor time during the contract day can **never** count as match.

Examples

- Lesson planning, curriculum supplement research, paper grading, classroom preparation (may include evenings, weekends, before or after school, lunch).
- Before and after school tutoring.
- College research for career explorations and discussions.
- Attendance and participation at GEAR UP sponsored events (College campus visits, Career fairs, GEAR UP National Conference, GEAR UP Capacity Building Conference).
- Professional development for supporting GEAR UP implemented initiatives – (Project Lead the Way, Math, Science, English Language Arts, Robotics), or other professional development that will increase your teaching effectiveness or content area.
- Assist students with completing FAFSA online during Parent Information Nights, as well as assist with completion of college applications, writing letters of recommendations and reviewing personal narratives.
- Emails, phone calls or meetings with GEAR UP staff, cohort students or parents related to GEAR UP activities, planning, events or interventions.
- Reviewing standardized test performance.
- Reading to preview books for lessons or classroom libraries.

- Reading/clipping articles you may use in class.
- Previewing films for classroom use.
- Participation in evening GEAR UP and other school events.
- Chaperoning summer school field trips.
- Writing letters of recommendation.
- Purchasing materials for teaching (bulletin board supplies etc.)

Note: Use Teacher/Counselor In-Kind form to report this In-Kind.

2. Other School Staff Time: Administrators and Classified Personnel

- All time devoted (during the day and beyond) to GU specific activities can be counted by administrators and classified personnel 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 GU, fielding GU related phone calls, GU meetings, working on GU mailings, preparing reimbursements, preparing for GU events, etc.
- All staff time submitted as match must support the goals and objectives of GEAR UP and be in addition to the general tasks expected of the employee.

Examples:

- Meetings, emails, or other correspondence related to GEAR UP planning, events, or interventions.
- Meetings with staff, GEAR UP students or parents related to GEAR UP planning, events, or interventions.
- Attendance and participation at GEAR UP Partner Management Team Meetings (including travel and prep. time).
- Helping to identify or coordinate community resources in support of GEAR UP program.
- Classroom observations for GEAR UP sponsored programs/or activities.
- Attendance and participation at GEAR UP conferences and GEAR UP sponsored events.

Note: Use Administrator In-Kind form to report this In-Kind.

3. Volunteer Time

- When members of the community, families or students volunteer to support GU students and activities, their time is counted as in-kind. GU recommends using the standard volunteer value set by school district or the state and should include benefits.

Examples

- Assistance with planning, preparation and/or assigned task for all GEAR UP sponsored events (attendance roster, registration of students, food service, and guide participants to scheduled event or activities).
- Participation in career presentations to students during GEAR UP events, career fairs.

Note: Use Volunteer In-Kind form to report this In-Kind.

4. Professional Development

- Any professional development (PD) during or after the school day paid for by the school district that supports GU objectives can be counted as match. Examples include, if the school pays for the GU coordinator to attend a conference at a local community college, a training on financial aid, or for coordinators to attend national GU conferences. Also included is on-site or school sponsored PD for GU teachers that promotes GU objectives such as rigorous curriculum, STEM, etc.

Note: Use Teacher/Counselor In-Kind form to report Professional Development time.

5. Materials and Supplies

Items purchased with the school's general funds, private grants or items donated to the GU program that support GU students and objectives can be counted as match. This could include:

- Copies
- Professional printing of GU materials
- Envelopes
- Mailings (postage)
- Event supplies
- Food
- School purchased licenses or subscriptions to benefit the GU 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 of the price of products or services reduced or waived specifically for the GU program.

Note: Use Goods & Services In-Kind form to report this In-Kind.

7. Facility Usage

- The value should be from the school's rate sheet 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 would have otherwise charged to use the space.

8. Travel

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

Examples

- Transportation: District provided - Mileage (state rate established) for school bus services or district vehicle to/from solely GEAR UP sponsored events.
- Charter services, airfare or auto rental expense donated by district for transportation of students/GEAR UP staff to/from solely GEAR UP events or sponsored activities.
- Use of personal vehicle and mileage (state rate established - not reimbursed by District) for travel to /from solely GEAR UP related events or activities.
- Travel time for any volunteer to and from solely GEAR UP related events or activities.

Note: Use Goods & Services In-Kind form to report this In-Kind.

9. Other

IT Support

- Contracted IT help with installation, service and maintenance of GEAR UP purchased equipment only.

Contractual Services

- Any contracted services purchased by the school or partner to serve the cohort students that meet the GEAR UP objectives, are verifiable and allowable in which the grantee would have paid for.
 - Example: a presenter is hired to present to the total school; a percentage of all costs (fee, travel, lodging, per diem, and car rental) could be considered cost share.
- Lodging - Donation of hotel room(s) for GEAR UP staff or attendee for GEAR UP related event.

Note: Use Goods & Services In-Kind form to report this In-Kind.

Alaska GEAR UP Objectives

All matching funds must support or assist to achieve the GEAR UP objectives as approved in the grant application. The following are the GU objectives.

1A) By 7th grade, increase the percentage of students' meeting proficiency on the State PEAKS Assessment in Math.

1B) By 7th grade, increase the percentage of students' meeting proficiency on the State PEAKS Assessment in English Language Arts.

1C) By 8th grade, increase the percentage of students' meeting proficiency on the State PEAKS Assessment in Science.

1D) By 9th grade, increase the percentage of students' enrolling in Algebra I..

1E) By 12th grade, increase the percentage of Alaska Native students' taking advanced courses in Math from a baseline of 18.5% by 30% as measured by school transcripts.

1F) By 12th grade, increase the percentage of students' taking advanced courses in Science.

1G) By the end of each year, provide teacher professional development on Math, Reading & Science.

2A) By 10th grade, increase the percentage of students' meeting proficiency on the State PEAKS Assessment in Math.

2B) By 10th grade, increase the percentage of students' meeting proficiency on the State PEAKS Assessment in English Language Arts.

2C) By 12th grade, increase the percentage of students' graduating with a diploma.

3A) Increase the percentage of students' who are knowledgeable about financial aid.

3B) By the end of 12th grade, increase the percentage students’ who are knowledgeable about applying to college.

3C) By 2024, increase the percentage of students’ who enroll and attend a college/university.

Documenting and Submitting Matching Funds Forms

Who documents matching funds by completing Matching Funds Forms?

School Districts: it is the expectation that each administrator, counselor, teacher or other school personnel completes a matching funds forms and signs the form certifying that their recorded time was spent on GEAR UP supporting or related activities. GEAR UP funded personnel will assist and train school personnel on how to complete the forms.

Partners: Each personnel with a partner organization completes a matching funds form and signs it to certify that their recorded time was spent on GEAR UP supporting activities.

GEAR UP Personnel: In most GEAR UP Programs, GU Coordinators complete forms for volunteers, donations and other contributions and has the contributor sign and date the form.

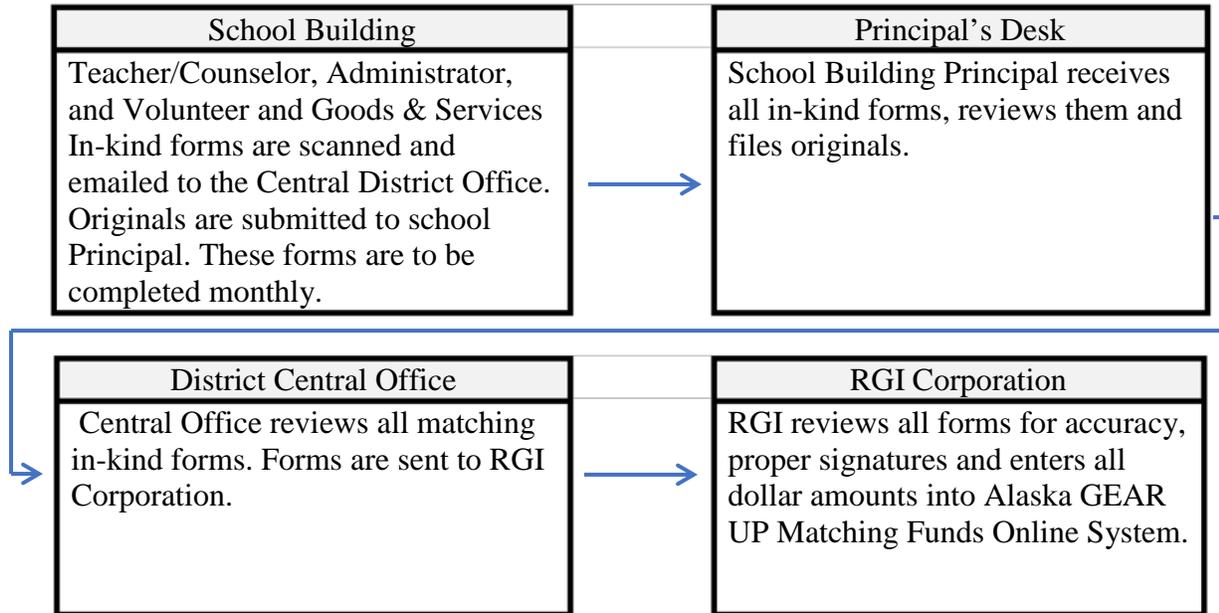
How are matching funds documented?

Alaska GEAR UP has developed specialized forms for each type of contribution that must be completed and signed by the contributor. These forms are included in this guide and fillable forms are also posted on the www.rgicorporation.com website. All the forms must be completed and contain original signatures from the contributor. All these forms should be scanned and emailed to the district office contact person. Please give the original forms to the school principal.

When and Where are forms submitted?

Matching forms for school and partner personnel time should be scanned and submitted on a monthly basis to the school district central office. Donations or other contributions should be submitted as they occur. All matching forms for the previous month should be **submitted by the 15th** of each subsequent month. This will ensure that we maintain and report a current balance of matching funds to the US Department of Education. The following is a flow chart illustrating who, when and what forms should be completed and submitted.

Flow of Matching Fund Forms



Matching In-Kind Forms

The Rural Alaska GEAR UP Partnership has developed forms to be completed by school personnel and partners to document and report matching funds as an in-kind contribution to GU. Below are the four most commonly used forms.

Matching In-Kind Forms

Teacher/Counselor In-Kind	Administrator In-Kind	Volunteer In-Kind	Goods & Services In-Kind
To be used by teachers and counselors for reporting time spent on GEAR UP activities beyond contracted hours.	To be used by Administrators for reporting time spent on GEAR UP activities during the regular day or beyond. Additional notes should be made in the administrator's calendar.	To be completed by Volunteers donating their time providing GEAR UP related activities for GEAR UP students or staff.	To be completed by school personnel for all donations provided to GEAR UP for related activities.