Coordinator Manual
Section 5 - Data Collection & Reporting

DATA COLLECTION PLAN

Washington State GEAR UP Data Collection Plan			
Type of Data to Be Collected	**Frequency**	**Target Population**	**Data Collection Method**
Student Demographics	Weekly	All students	OSPI CEDARS
Tutoring Participation	Weekly	All students	WSAC Portal
Mentoring Services	Weekly	All students	WSAC Portal
College Admissions and Financial Aid Advising and Guidance	Weekly	All students	WSAC Portal
College Visits and Education Field Trips	Weekly	All students and parents	WSAC Portal
Standardized Test Results	Annually	All students	OSPI CEDARS, ACT
Family Workshops	Quarterly	All parents	WSAC Portal
Student Course Enrollment & Completion	Weekly	All students	OSPI CEDARS
Student Grades & Transcripts Records	Annually	All students	OSPI CEDARS
Summer Activity Participation	Summer	All students	WSAC Portal
Transition Services	Annually	8th and 12th graders	WSAC Portal
College and Career Exploration Activities	Weekly	All students	WSAC Portal
Professional Development Participation and Evaluation	Six times per year.	School staff participants	WSAC Attendance and Evaluation Records
Postsecondary Applications	Annually	12th graders	WSAC Portal
FAFSA Completion	Annually	12th graders	WSAC Portal, Survey, US Dept of Education
Student and Parent Knowledge/Aspirations for College	Semi-annually	All students and parents	Dept. of Ed. Survey
Promotion to Next Grade Level	Annually	All students	OSPI CEDARS
Average Daily Attendance	Weekly	All target schools	OSPI CEDARS
High School Graduation	Annually	12th graders	OSPI CEDARS
Postsecondary Enrollment	Annually	College freshman	ERDC
Enrollment in Remedial Courses at College Level	Annually	College freshman	ERDC
Grade Point Average	Annually	All students	OSPI CEDARS

GEAR UP WASHINGTON STATE

GEAR UP ACTIVITY TYPE DEFINITIONS

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GEAR UP Activity Type Definitions

Use the GEAR UP Student Service Definitions to determine the Activity Type for GEAR UP services. It is imperative that you follow these guidelines; as they are aligned with GEAR UP reporting and evaluation requirements

If you have any questions, please contact Kelly Keeney at kellyk@wsac.wa.gov or 360-753-7838.

What is entered in the portal?

When determining what should be documented as a GEAR UP activity, the first question is always, "Is this happening because of GEAR UP, or would it occur anyway (absent GEAR UP funding or staff)?" Only activities that are directly tied to the GEAR UP work plan, budget, and staff are documented as GEAR UP activities.

All services or activities provided by GEAR UP are entered in the portal. These include:

- Direct services: GEAR UP paid staff time spent working with students (tutoring, mentoring, counseling, and providing workshops).
- Activities that are provided by GEAR UP: Field trips, assemblies, workshops, classes, and events that are planned, facilitated and/or supervised by GEAR UP staff.
- Activities that are paid for or required by GEAR UP: College placement testing, credit retrieval courses, summer school, etc.

What's not entered in the portal?

- When GEAR UP purchases materials for classroom use, but no direct service is provided by GEAR UP paid staff, this is not entered in the portal. Examples include robotics supplies, classroom calculators, WOIS subscriptions, etc.
- Activities that support GEAR UP goals, but are not part of your approved work plan and would exist on their own without GEAR UP are not entered in the portal. Examples include, EOC assessments, SBAC, Running Start, or other programs that have been supported in your school prior to GEAR UP.
- Student led conferences are not USUALLY a GEAR UP activity, if your school had them in place prior to GEAR UP. However, if there is an activity that you do as part of GEAR UP to enhance student led conferences, they may be entered in the portal.

  - **Not sure? Check with Kelly, kellyk@wsac.wa.gov or 360-753-7838.**

General Reminders

- All GEAR UP activities must be documented with student/family sign-in sheets, attendance records, or the Individual Services Tracking Form. All forms can be found on the GEAR UP Website at: http://www.gearup.wa.gov/grant-management. This documentation must be retained by your program with all other GEAR UP records and are subject to audit at any time.
- Your GEAR UP Activity Portal entries will be reviewed by WSAC staff and you will be notified via email if there are questions about any of your entries.
- In general, activities that are at least 10 minutes in duration are entered in the portal. Activities less than 10 minutes in duration are not entered.
- If you have an activity that doesn't seem to meet any of the definitions provided in this manual, please contact Kelly Keeney (kellyk@wsac.wa.gov or 360-753-7838) before entering that activity.

Notes

GEAR UP Student Service Definitions
Tutoring & Homework Assistance

Tutoring/Homework Assistance - Tutoring and homework assistance services that provide additional academic instruction designed to increase the academic achievement of students.

Tutoring can occur one-on-one or in small groups before school, during school, after school, during study time, lunch breaks, or on weekends.

Services are provided by any of the following:

- GEAR UP Staff.
- GEAR UP Hired Tutors.
- Teachers (only when tutoring is provided outside of the contract day, or if teachers are paid by GEAR UP for tutoring).
- Trained Peers.
- Volunteers.

Tutoring should be recorded by these subject areas when tutoring is specific in content:

- Tutoring/HWA/Language Arts.
- Tutoring/HWA/Math.
- Tutoring/HWY/Science.
- Tutoring/HWA/Social Sciences.

Tutoring/HWA/General – when tutoring is not specific in content, such as in an afterschool program

Example Tutoring Activities include but are not limited to:

- Before/After school tutoring.
- After school book clubs.
- In-class assistance if provided by GU staff.
- Lunch homework help.
- Saturday school.

Virtual tutoring/homework assistance: Virtual tutoring services include services that are provided via remote access through the internet or other means.

Note: *If you provide virtual tutoring, please contact Kelly for clarification.*

Activity Notes: _____

GEAR UP Student Service Definitions
Comprehensive Mentoring

Comprehensive Mentoring - Comprehensive mentoring services are provided when GEAR UP staff, teachers, or other school staff identify students who would benefit from an ongoing supportive relationship with a trained, caring adult or older student, i.e., "mentor." Mentors meet regularly with their assigned student(s). Meetings may be on or off campus and either during or outside of the school day. Typical issues addressed during mentoring meeting are academic, social, organization, or life skills development.

Per the 2008 Higher Education Opportunity Act, comprehensive mentoring must provide students with financial aid information, and encourage students to stay in school, enroll in rigorous and challenging coursework, apply for postsecondary education, and, if applicable, the GEAR UP scholarship.

Mentoring programs may include:

- Traditional mentoring programs that match one youth and one adult.
- Group mentoring that links one adult with a small group of young people.
- Team mentoring that involves several adults working with small groups of young people, ideally with a ratio of no more than four youth to one adult.
- Peer mentoring that connects caring youth with other adolescents.
- E-mentoring that functions via email and the internet.

Example Mentoring Activities include but are not limited to:

- Community member mentors.
- Check & Connect.
- Peer or near peer mentoring.
- Hero Programs.
- Link Crew.
- Individual student intervention.

Virtual comprehensive mentoring: Virtual comprehensive mentoring includes services that are provided via remote access through the internet or other means.

Note: *If you provide virtual mentoring, please contact Kelly for clarification.*

Activity Notes: _____

GEAR UP Student Service Definitions
Financial Aid Counseling/Advising

Financial Aid Counseling/Advising - Financial aid counseling/advising services assist students' understanding and navigating the complexities of financial aid.

Financial Aid counseling may include:

- Providing hands-on assistance with the FAFSA.
- Assistance with scholarship applications.
- Presentations on financial aid or literacy using financial aid or literacy curriculum.
- The benefits and information about enrollment in college savings plans.

Example Financial Aid Counseling & Advising Activities include but are not limited to:

- 16 Summers curriculum.
- The Vault curriculum.
- FAFSA Forecaster activities.
- Scholarship information and application events.
- FAFSA information and completion support.
- College Goal Washington events.
- Thewashboard.org activities.
- WSECU workshops.
- Money Talks curriculum.
- Dave Ramsey curriculum.
- College Bound Scholarship presentations/sign-up events.

Virtual financial aid counseling/advising: Virtual financial aid counseling/advising includes services that are provided via remote access through the internet or other means.

Note: *If you provide virtual financial aid counseling, please contact Kelly for clarification.*

Activity Notes:

GEAR UP Student Service Definitions
Counseling/Advising/Academic Planning/Career Counseling (CAAPCC)

Counseling/Advising/Academic Planning/Career Counseling (CAAPCC) – Counseling, advising, academic planning and career counseling services span a spectrum of activities with individual students or small groups of students. Services are defined as follows:

- **Counseling –** Discussing personal growth issues such as decision making, problem solving, goal setting, attendance, behavior concerns, or family issues.
- **Advising –** Providing assistance on course selection (secondary or postsecondary), college and/or career choices, or college and/or career planning.
- **Academic Planning –** Providing assistance on coursework selection, course of study choices, college major selection, assessment advising or interpretation of scores, or assistance with placement tests.
- **Career Counseling –** Providing assistance about career choices, career planning, internships, or career interests.

In general, activities in this category are individualized conversations that are applicable specifically to the student(s) involved. Participants leave the session with individualized advice or direction based on the discussion about their unique, specific situation. Small group activities may be considered only when the information remains specific to the individuals participating. In most cases, the services are provided by GEAR UP staff and not others.

***NOTE*:** If activities do not meet the "individualized" criteria, it is likely a Student Workshop. Review that definition to determine the appropriate activity type. Some of the examples listed below, could be either CAAPCC or a Student Workshop depending on the content of the activity, (individualized vs. generic).

Example CAAPCC Activities include but are not limited to:

- Advisory activities.
- GEAR UP staff providing individualized support to students that is not mentoring.
- Career inventories.
- College research activities.
- Reviewing Aspire, PLAN, ACT, and SAT results.
- College & military rep visits.
- College application week activities that are individualized.

Virtual Counseling/Advising/Academic Planning/Career Counseling: Virtual counseling/advising/academic planning/career counseling includes services that are provided via remote access through the internet or other means.

Note: *If you provide virtual counseling, please contact Kelly for clarification.*

Activity Notes

GEAR UP Student Service Definitions-
College Visit/College Student Shadowing

College Visit/College Student Shadowing – College visit and college student shadowing activities are services that take place on a college campus.

College Visit: Is a physical visit to a college campus by a student and is facilitated/supervised/led by GEAR UP staff, teachers, college representatives, or other school staff. College visits should include:

1. A campus tour led by the college's admission department, visitation program, or other on-campus entity that regularly provides this service.
2. Presentations by admissions, financial aid, academic departments, athletics, student affairs, residence life, multicultural affairs, student services or other college departments.
3. A classroom experience, or participation in a college level discussion. When this is not possible, time with a professor or graduate student instructor is acceptable.
4. College fairs and other visits to a college campus that do not include the criteria above, are NOT considered a college visit, and may be a 'Student Workshop' or 'Educational Field Trip' activity type. Review all definitions before making a determination.
5. College Planning Days are NOT considered a College Visit, they are a Student Workshop.

College Student Shadowing: A one-on-one experience in which a middle or high school student spends a day on a college campus with an undergraduate student experiencing college life for a typical undergraduate.

Virtual College Visit: Virtual college visit includes services that are provided via remote access through the internet or other means. Virtual college visits must be facilitated/supervised/led by GEAR UP staff, teachers, or other school staff and include the same elements as a physical college visit.

Note: *Data entry needs to indicate whether the college visit services are "in-person" or "virtual," as well as the name and/or type of college visited, i.e., 2- or 4-year college.*

Activity Notes

GEAR UP Student Service Definitions-
Educational Fieldtrips

Educational Field Trips– Educational field trips are services during which students leave their school and travel to another location, and also include an academic component that is linked to classroom activities. Examples would include a science demonstration on a college campus (the purpose of the event was the science demonstration not a college visit), a class trip to attend a science or history museum linked to curriculum, academic competitions, cultural experiences such as performing arts, museums, or similar activity, and field trips that complement and enhance existing curriculum in key content areas.

Educational Field Trips should be recorded by subject area:

- Educational Field Trip – Language Arts.
- Educational Field Trip – Mathematics.
- Educational Field Trip – Other.
- Educational Field Trip – Science.
- Educational Field Trip – Social Science

Example Educational Field Trip Activities ***include but are not limited to:***

- College sponsored academic events like Math Days, Engineering Days, Health Sciences Fair.
- Museums.
- Theater performances.
- Academic competitions like robotics, ProStart.
- Capitol Campus ~ Olympia.
- Cultural events on college campuses.
- Activities that are directly tied to classroom curriculum (wind farm field trip as an extension of science class; water quality testing as an extension of marine biology).

Activity Notes:

GEAR UP Student Service Definitions-
Job Site Visit/Job Shadowing

Job Site Visit/Job Shadowing –Job site visit/job shadowing services offer student exposure to the workplace in an occupational area of interest and reinforces the link between classroom learning, work requirements, and the need for post-secondary education. Students witness the work environment, employability, occupational skills in practice, the value of professional training, and potential career options.

- **A Job Site Visit -** Is a physical visit to a local business/work environment facilitated/supervised/led by GEAR UP staff, teachers, or other school staff. Job site visits should include visits to local businesses, employers, and agencies to explore different professions or career selections, and can be followed by job shadowing.
- **Job Shadowing –** A one-on-one experience in which a middle or high school student spends a day at a business or work environment with an employee seeing typical job duties.
- **Virtual Job Site Visit -** Virtual job site visit includes services that are provided via remote access through the internet or other means. Virtual job visits must be facilitated/supervised/led by GEAR UP staff, teachers, or other school staff and include the same elements as a physical job visit.

Example Job Site Visit/Job Shadowing Activities *include but are not limited to:*

- Job shadow experiences.
- Field trip to a business, industry, or job site.
- Mock Interviews.
- Construction Career Day.
- Pizza, Pop, and Power Tools.
- Business Week (during the school year, not summer)

Note: *Data entry needs to indicate whether the job site visit services are "in-person" or "virtual."*

Activity Notes:

GEAR UP Student Service Definitions-
Student Workshops

Student Workshops - Student workshops are services that include interactive informational classroom-level, large - or small-group sessions that involve hands-on experience for each student in the workshop. 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 and highlight careers.

Student Workshops Generally -

- May be held on school campus or an off-campus venue.
- All students receive the same information during the workshop, it is not individualized.
- Are informational in nature and are not intended to provide direct counseling or guidance to individual or small groups of students. (Activities of this nature are CAAPCC, as defined).
- Have a presenter or guest speaker.
- Have an agenda or lesson plan.
- May have visual aids and/or handouts.
- Start and end at a set time, and all students participate for that set time.
- Generally, participants leave the session with a better general understanding of the topic addressed.

Example Student Workshop Activities *include but are not limited to:*

- College fairs.
- Career fairs.
- Guest Speakers (not college recruiters).
- College application activities that are general in nature.
- First Aid/CPR.
- Speed Jobbing.
- College Planning Days.
- Latina Youth Conference.
- CISPUS Leadership Camp.
- Ropes/Challenge course.

- **Virtual Student Workshops -** Virtual student workshops include services that are provided via remote access through the internet or other means.

Note: *Data entry needs to indicate whether the workshop services are "in-person" or "virtual."*

Activity Notes:

GEAR UP Student Service Definitions-
Tests/Test Preparation

Tests/Test Preparation – College readiness assessments, or preparation activities for assessments.

- **Entering Student Assessments:** Enter assessment participation for the following assessments *whether GEAR UP pays for it or not.* This is the only method we have of tracking your compliance with this requirement.
  - Aspire (previously EXPLORE, PLAN).
  - ACT.
  - Compass.
  - ASVAB.
  - PSAT.
  - SAT.
  - Accuplacer.

  - **Priority Schools:** You must enter all GEAR UP students who complete any of the listed assessments. You may opt to enter non-GEAR UP students, but it is not required.
  - **Cohort Schools:** You must enter all GEAR UP students (Class of 2017). Do not enter other students.

- **Test Preparation:** Any test preparation, for any assessment that is provided by GEAR UP must be entered in the portal. This may include the required assessments above, and those we don't track, listed below. For example, we don't record End of Course Exams (EOC) as a GEAR UP activity in the portal because it does not qualify as a GEAR UP activity (it would happen without GEAR UP). However, if GEAR UP staff facilitate an EOC preparation activity, or GEAR UP pays for an EOC preparation class, then the preparation activity is entered in the portal (because that activity wouldn't happen without GEAR UP).

- **Assessments that are not Entered in the Portal:**
  - End *of Course Exams (EOC).*
  - MSP/HSPE/SBA.
  - MAPS.

Reporting Assessment Participation in the Portal:

- Enter assessments for each day they are offered for your students.
- If the assessment is offered on multiple days, create a multi-day activity.
- Enter the actual number of hours the test is offered, which is the standard time the test is expected to complete. The completion time does not have to be adjusted by student.

➢ **Test/Test Preparation continued on next page**

Naming Test Assessment & Preparation Activities (cont.) - When entering assessments in the portal, use the naming conventions below. Examples include: Do not add any other information to the test name, such as *"BBCC Compass Test"*, or *"GHCC College Placement Test"*.

- ACT Test
- SAT Test
- Accuplacer Test
- Aspire Test – 8th Grade
- Aspire Test – 10th Grade
- ASVAB Test
- Compass Test
- PSAT Test
- Test Prep – EOC
- Test Prep - ACT-
- Test Prep - SAT
- Test Prep - SBAC
- Test Prep – AP

- **Note –** Do not enter "Registered for SAT/ACT" as an activity. You should only enter when you have confirmed that the student actually took the test. However, if you are counseling students about taking an assessment, this should be recorded as a CAAPCC activity.

- **AP Testing:** AP Testing is entered as an "Other – Fee Only" Activity Type. Click on the link, or see information in the "Other – Fee Only" section, below.

Activity Notes:

GEAR UP Student Service Definitions-
Summer Programs

Summer Programs - Summer programs are services that include an experience over one or multiple days during the summer, (or other non-school year time, i.e., for year round schools). 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.

Summer Programs Activity Types Include:

- **Summer Programs - Academic Enrichment:** These are summer experiences that enhance a student's academic experience, increase their knowledge of college preparation and planning, or provide access to rigorous coursework. These may include:
  - **Summer School:** when facilitated or taught by GEAR UP paid staff and is rigorous or advanced in nature (not remedial or credit retrieval). GEAR UP staff must provide direct service to the students, and only the time providing direct service is documented. For example, the student is in class 4 hours per day and the class is taught by a non-GEAR UP paid staff. The GEAR UP staff provides assistance to the student for 20 minutes per day, or it may vary. Only the time spent directly with the student is recorded.
  - **GEAR UP Summer Camps:** These camp experiences are fully funded by GEAR UP, so the full time students spend in the program are documented in the portal: For example --
    - GEAR UP Summer Camp (GEAR UP, Get Ready!, GEAR UP Focus Camps).
    - GEAR UP Leadership Institute at UW.
    - NCCEP/GEAR UP Leadership Institute.

- **Summer Programs – Remedial Services:** These are summer experiences that help students make up credit deficiencies, or build academic skills where there are gaps. These may include:
  - Summer school when facilitated or taught by GEAR UP paid staff.
  - Credit recovery or retrieval taken in summer school that is facilitated or taught by GEAR UP paid staff.
  - GEAR UP staff must provide direct service to the students, and only the time providing direct service is documented.
  - For example, the student is in class 4 hours per day and the class is taught by a non-GEAR UP paid staff. The GEAR UP staff provides assistance to the student for 20 minutes per day, or it may vary. Only the time spent directly with the student is recorded.

➢ **Summer Programs continued on next page**

- **Summer Programs – Fee Only**
  - Any program during the summer session in which no direct support from GEAR UP staff is provided but GEAR UP provides the funding for the coursework or summer camp.
  - Summer camp from GEAR UP approved/endorsed list, including Business Week.
  - Summer school when GEAR UP is not providing any direct service, but pays tuition. This may be academic enrichment courses, credit retrieval, or remedial coursework.

Note: *Data entry needs to indicate whether summer programs are providing services for "academic enrichment" or "remedial services." In addition, summer programs may include other services that should be recorded as such, i.e., college visit.*

Activity Notes:

GEAR UP Student Service Definitions-
Student Orientation

Student Orientation - Student orientation refers to the annual fall event, or new student events, that inform **all** students of the available opportunities in GEAR UP.

- All schools are required by contract to conduct a Student Orientation by October 1 each year.
- New student orientations throughout the academic year are also recommended.
- The activity name must include "Student Orientation."

Activity Notes:

GEAR UP Student Service Definitions-
"Other" and "Other-Fee' Only"

Other– This category is only used when a GEAR UP activity does not fit into any other Activity Type.

Examples of 'Other' Activities Include, but are not Limited to:

- **National GEAR UP week activities:** Only those activities that provide a direct service are entered in the portal. You may do other, fabulous things, but they don't qualify for portal entry, such as, having your students wear college gear for a day. All NGU Week activities, both direct service and non-direct service, are reported to Katherine Kersten at the conclusion of NGUW so you will get credit for them in this way. Here are some examples of what should be entered in the portal for NGUW:
  - Student time spent decorating bulletin boards or classroom doors.
  - Daily announcements by GEAR UP staff – must be at least 10 minutes in duration.
  - GEAR UP Bingo, Jeopardy or other games.
  - College Knowledge Passports.
  - Community service activities.
- **Academic recognition events:** specific to GEAR UP program For example, "Pi Day" to celebrate GEAR UP students who have a 3.14 GPA or better is an "Other." A graduation celebration at the end of the year is not a GEAR UP activity, usually, since they would happen anyway.
- **Classes during the school day:** when GEAR UP is paying for the teacher's time. For example, if a teacher is paid with GEAR UP funds to provide a robotics class as part of the regular school day, all participation data is entered under 'Other'.

Other – 'Fee Only' Service Category Description – Use this Activity Type when GEAR UP pays a required fee on behalf of a student to participate in an activity, but no direct service is provided by GEAR UP staff or other staff paid by GEAR UP. Examples may include:

- AP Test Fees/
- Accelerated/rigorous course tuition.
- College in the High School when fees are paid by GEAR UP.
- STAMP (language proficiency exam) when fees are paid by GEAR UP.
- Credit retrieval course tuition.

NOTE: *Summer activities, including summer school or camp, are not included in "Other-Fee Only." See section on Summer activities for detail.*

Activity Notes:

Entering and Tracking College Applications in the Portal

College Applications - College applications must be tracked by individual student on the 'Student Tab' in your GEAR UP Activity Portal. If there was direct service provided to the student or students, that activity would be entered separately under the corresponding Activity Type, 'Counseling and Advising', or, depending on the activity, "Student Workshops'.

1. Login to the WSAC Portal.
2. Choose the GEAR UP Program from your program choices.
3. Click on the '*Students*' link.
4. From here you can search for your GEAR UP students either by SSID, First Name, or Last Name. (You will need to type the student's full first or last name out. Unlike adding the student to an activity, it will not self-populate). You can also search without filtering, which will give you all your students enrolled in your school.
5. Click on the student's SSID, this will take you to the individual student record.
6. Across the top of the page, **you** will see three tabs, '*Activities*,' '*College Apps*', and '*Notes*'.
7. Below that are two tabs, '*Student Activities*' and '*Parent/Family Activities*'.
8. Click on the '*College Apps*' tab.
9. Click on the '*+ Add Application*' button.
10. Much like adding a College Visit Activity, you will add the college the student has applied to by starting to type the name of the college in the '*College*' drop-down box and then the date. Later, if the student is accepted to that college, you will put a check mark in the '*Accepted by College*' box.
11. Click on the '*Save*' button at the bottom right hand corner of the '*College Application*' box.
12. The college the student applied to will now show up on the student's '*College Apps*' tab.
13. Add all the colleges the student applies to using this method. Once you know a student has been accepted to a particular college, use the 'Edit' feature to mark tat application as 'Accepted.'

Activity Notes:

GEAR UP Service Definitions
Family Events-College Visits

Family Events – College Visits – Family Events-College Visits are services that take place on a college campus by a parent/guardian, with or without the GEAR UP student. These are college visits that are facilitated, supervised, or led by GEAR UP paid staff, or college representatives. The primary objective of the event would be to conduct a college visit. This should include an official tour, presentation(s) by admissions, academic departments, athletics, student affairs, residence life, multicultural affairs, and other college departments.

Family Events - Virtual College Visits – Virtual parent/guardian college visits includes services that are provided via remote access through the internet or other means. Virtual college visits must be facilitated/supervised/led by GEAR UP staff, teachers, or other school staff and include the same elements as a physical college visit.

Activity Notes

GEAR UP Service Definitions
Family Events-Counseling & Advising

Family Events-Counseling & Advising – Family counseling and advising activities provide services that span a spectrum of activities. These activities can include one-on-one or small group advising for parents, guardians or adult family members. These activities are designed to meet the specific needs of the individuals engaged in the activity.

- **Counseling:** Meeting with parents/guardians to discuss student's personal growth issues such as decision making, goal setting, behavior concerns, family issues, home visits, etc.
- **Advising:** Providing individual assistance to parents/guardians on their student's college choices, college planning, financial aid planning, etc.

Family Counseling & Advising Example Activities –

- Academic planning and intervention.
- Individual in-person meetings, phone meetings with family (not robo-calls).
- Providing information about course requirements, registration, and transition to high school activities.
- Student Led Conferences.

Activity Notes

GEAR UP Service Definitions
Family Events-Workshops-College Prep & Financial Aid

Family Events - Workshops - College Prep and Financial Aid – College prep and financial aid family workshops include services that demonstrate how to assist their GEAR UP student with college preparation or financial aid information. These services focus on college entrance requirements and financial aid opportunities.

Example College Prep & Financial Aid Workshops for Parents:

- 16 Summers Family Presentations
- Scholarship Junkies Family Night
- ACT/SAT Test Results-Family Night
- College & Career Family Events
- College Application Activities
- Financial Aid Literacy Curriculum for Families
- College Goal Family Events
- FAFSA Completion-Family Events
- Financial Aid Awareness Nights-Family

Virtual Parent/Family Workshops: Virtual parent/family workshops include services that are provided via remote access through the internet or other means.

NOTE: *Data entry needs to indicate whether workshops are "in-person" or "virtual."*

Activity Notes

GEAR UP Service Definitions
Family Events-Orientation or Celebratory

Family Events – Orientation or Celebratory – Orientation or Celebratory family events provide services in which the GEAR UP student's parent or guardians participate. These events recognize the role of a family's participation in student success, and are events not defined under a previous family event category.

Example Orientation or Celebratory Family Events:

- Required Annual Family Orientation.
- Back to School Night.
- Year-end GEAR UP Celebrations.
- Celebrating GU Progress & Achievements.

Activity Notes

Individual Student Services Tracking

STAFF NAME: _____

Activity Type

SCA	Counseling/Advising/Academic Planning/Career Counseling	SFA	Financial Aid Counseling/Advising	PCA	Parents - Counseling/Advising (family)
SCM	Comprehensive Mentoring Services	STU	Tutoring-List Type	PFA	Parents - College Prep & Financial Aid (family)

Date	Student Name	Time	Type	If Family type, was student present?	Notes	Portal

STUDENT EVENT PARTICIPATION LOG

Directions:

1. Use this form to document participation in all GEAR UP student events. You will use this form to enter participation records into the WSAC Portal Database. The form must be accurate and legible.
2. For ALL student events, the student is required to sign-in. Computer generated forms are not acceptable documentation, unless the student initials to verify participation.
3. The log should match the Expenditure Detail Form for attendance when food is provided.
4. Keep this form on file; do not submit to WSAC unless requested.

Name of Activity: _____Date of Activity:_____

Time of Activity: _____ to _____ Supervised by:_____

	Student Name	Grade Level	Student Signature
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

Attach additional sheets if needed.

_____

GU Coordinator Signature **Date**

FAMILY EVENT PARTICIPATION LOG

Directions:

1. Use this form to document participation in all GEAR UP family events. You will use this form to enter participation records into the WSAC Portal Database. The form must be accurate and legible.
2. For ALL family events, you must also include the student name. Indicate with a Y/N if the student attended or not.
3. The log should match the Expenditure Detail Form for attendance when food is provided.
4. Keep this form on file, do not submit to WSAC unless requested.

Name of Activity: **Date of Activity:**

Time of Activity: **to** **Supervised by:**

	Student Name	Grade Level	Attended? (Y)es or (N)o	Family Member Names	# Adults Attending
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					

Attach additional sheets if needed.

GU Coordinator Signature _____

PROFESSIONAL DEVELOPMENT PARTICIPATION LOG

Directions:

1. Use this form to document participation in all professional development events. You will use this form to enter participation records into the WSAC Portal Database. The form must be accurate and legible.
2. For ALL professional development events, the attendee is required to sign-in.
3. The log should match the Expenditure Detail Form for attendance when food is provided.
4. Keep this form on file; do not submit to WSAC unless requested, or if you are billing for food provided during the event.

Name of Activity: _____Date of Activity:_____
Time of Activity: _____ to _____ Supervised by:_____

	Attendee Name (PRINT)	Attendee Signature	Position
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

Site Coordinator Signature:_____
Attach additional sheets if needed.

SUPERINTENDENT OF PUBLIC INSTRUCTION

Randy I. Dorn Old Capitol Building · PO BOX 47200 · Olympia, WA 98504-7200 · http://www.k12.wa.us

October 27, 2014

( ) Action Required
(x) Informational

MEMORANDUM NO. 054-14 CHILD NUTRITION SERVICES

TO: Educational Service District Superintendents
School District Superintendents
School District Assistant Superintendents for Business and/or Business Managers
School District Food Service Supervisors
Administrators of Select Private Schools
Administrators of Residential Child Care Institutions

FROM: Randy I. Dorn, State Superintendent of Public Instruction

RE: Guidance on the Disclosure of Free and Reduced-Price Information and Eligibility Status

CONTACT:

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Pam Mahre (Yakima)	(509) 575-2412	pam.mahre@k12.wa.us
Agency TTY	(360) 664-3631	

The purpose of this memorandum is to provide local education agencies (LEAs) updated information and guidance for the disclosure (release/sharing) of free and reduced-price eligibility information and status. Eligibility status refers to eligibility for free and reduced-price meals as well as free milk. Disclosure of eligibility information and status is always an option, not a requirement.

Student and household information collected for the purpose of determining free and reduced-priced meal eligibility for Child Nutrition Programs is protected under US Department of Agriculture (USDA) rules of confidentiality. The information obtained may only be disclosed in certain, very specific situations. The complete law, *7 Code of Federal Regulations Section 245.6* can be found at http://www.fns.usda.gov/sites/default/files/7CFRpart245_2014.pdf. USDA provides additional guidance in the *Eligibility Manual for School Meals* located at http://www.fns.usda.gov/sites/default/files/EliMan.pdf.

Aggregate Data
LEAs may always disclose aggregate free and reduced-price eligibility data when children cannot be identified by the data or by means of deduction. An example of aggregate data is the total number of children eligible for free or reduced-price meals in a school district or individual school.

Need to Know
Although a program or person may be authorized under the National School Lunch Act to receive free and reduced-price eligibility information, there must be a legitimate "need to know" to provide a service or carry out an authorized activity.

Disclosing Eligibility Information and Status
LEAs may disclose children's free and reduced price meal eligibility information to programs, activities and individuals that are specifically authorized access under the National School Lunch Act. The authority to disclose eligibility information depends on the type of program for which the information is being requested, who is requesting the information, and whether or not parental consent is required prior to the release of information. The *USDA Disclosure Chart (Attachment A)* outlines programs and circumstances for disclosing eligibility information. The Disclosure Chart can also be found in the Eligibility Manual for School Meals. The *Confidentiality Requirements of Common Programs* (*Attachment B)* provides a list of common programs and their confidentiality requirements.

Parental Consent Required
When parental consent is required the LEA must obtain written consent from the child's parent or guardian (who is a member of the child's household) prior to the disclosure of information about the child's eligibility status. Consent must be obtained for each individual program and parents/guardians must be permitted to limit consent only to those programs with which they wish to share information. The state *Application for Free and Reduced-Price Meals* (*Attachment C*) provides an area in Section 6 for parental consent to be obtained. LEAs may also use the *Parental Release of Information* form *(Attachment D)* to obtain parental consent. The *Parental Release of Information* form may also be used for students eligible for free meals through direct certification or community eligibility, where a meal application is not required.

Parental Notification
Households must be informed that the information they provide on the free and reduced-price meal or free milk application may be disclosed to other programs. This information has been included in the state *Application for Free and Reduced-Price Meals*. For directly certified children, the notice of potential disclosure must be included in the document informing parents/guardians of their eligibility for free meals or free milk through direct certification.

Student Records in Child Nutrition Programs
The Federal Department of Education has established that education records are under the scope of the Family Education Rights and Privacy Act (FERPA). If free and reduced-priced information and eligibility status is maintained as a part of a student's education record, both FERPA and the National School Lunch Act disclosure rules apply.

Data Sharing Agreement
In any situation where information will be released, an agreement to keep the information confidential should be put in place. The *Data Sharing Agreement (Attachment E)* provides a prototype form to use for a data sharing agreement.

Penalties for Unauthorized Disclosure
The National School Lunch Act establishes a fine of not more than $1,000 or imprisonment of not more than one year, or both, for publishing, divulging, disclosing, or making known in any manner or extent not authorized by Federal law, any eligibility information. Entities authorized to receive data under a data sharing agreement, may not share that data with another entity or for any other purpose. For example, food services shares information via data share agreement with a principal, the principal may not share that information with the school counselor.

If you have questions regarding this memorandum, please contact your NSLP program specialist. The agency TTY number is (360) 664-3631.

This information is also available on OSPI's website at http://www.k12.wa.us/BulletinsMemos/memoranda2014.aspx.

EXECUTIVE SERVICES

Ken Kanikeberg
Chief of Staff

FINANCIAL SERVICES

JoLynn Berge
Chief Financial Officer

CHILD NUTRITION SERVICES

Donna Parsons, MS, RD, SNS
Director, Child Nutrition Services

RD:kew

Attachments:
Attachment A: USDA Disclosure Chart
Attachment B: Confidentiality Requirements of Common Programs
Attachment C: Application for Free and Reduced-Price Meals
Attachment D: Parental Release of Information
Attachment E: Data Sharing Agreement

The U.S. Department of Agriculture (USDA) prohibits discrimination against its customers, employees, and applicants for employment on the bases of race, color, national origin, age, disability, sex, gender identity, religion, reprisal and, where applicable, political beliefs, marital status, familial or parental status, sexual orientation, or if all or part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.) If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at http://www.ascr.usda.gov/complaint_filing_cust.html, or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at program.intake@usda.gov. Individuals who are deaf, hard of hearing, or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339 or (800) 845-6136 (in Spanish). USDA is an equal opportunity provider and employer.

Disclosure Chart

From the USDA Eligibility Manual for School Meals

The National School Lunch Act specifies that persons directly connected with the administration or enforcement of certain programs or activities are permitted to have access to children's eligibility information. The following chart shows circumstances for disclosing eligibility information.

Recipient of information	What May be Disclosed	Requirement
Programs under the National School Lunch Act or Child Nutrition Act	All eligibility information	Prior notice and consent not required
Federal/State or local means tested nutrition programs with eligibility standards comparable to the NSLP	Eligibility status only	Prior notice and consent not required
Federal education programs	Eligibility status only	Prior notice and consent not required
State education programs administered by a State agency or local education agency	Eligibility status only	Prior notice and consent not required
Local education programs	NO eligibility information, unless parental consent is obtained	Parental consent
Medicaid or the State Children's Health Insurance Programs (SCHIP), administered by a State or local agency authorized under titles XIX or XXI of the Social Security Act to identify and enroll eligible children	All eligibility information unless parents elect not to have information disclosed	Must give prior notice to parents and opportunity to decline to have their information disclosed
State health programs other than Medicaid/SCHIP, administered by a State agency or local education agency	Eligibility status only	Prior consent not required
Federal health programs other than Medicaid/SCHIP	NO eligibility information, unless parental consent is obtained	Parental consent
Local health program	NO eligibility information, unless parental consent is obtained	Parental consent
Comptroller General of the United States for purposes of audit and examination	All eligibility information	Prior notice and consent not required
Federal, State, or local law enforcement officials investigating alleged violations of any of the programs under the NSLA and CAN or investigating violations of any of the programs that are authorized to have access to names and eligibility status	All eligibility information	Prior notice and consent not required

PRIORITY MODEL ELIGIBILITY VERIFICATION

Instructions

Priority students are defined in the law as any student in secondary school who is eligible to be counted under section 1124 (c) of the Elementary and Secondary Education Act of 1965; eligible for assistance under a State program funded under part A or E of Title IV of the Social Security Act; eligible for assistance under subtitle B of title VII of the McKinney-Vento Homeless Assistance Act; or otherwise considered by the applicant to be a disconnected student.

Priority Model schools must document student eligibility for GEAR UP services. Below are the guidelines for determining eligibility.

1. Students are eligible to participate in GEAR UP activities and receive GEAR UP services if they meet any one of the following poverty indicators:
    a. Eligible for free/reduced meals at school (whether they apply or not).
    b. Family receives public assistance such as TANF, food stamps, or state Medicaid.
    c. Family receives social security disability.
    d. Student is in foster care or homeless.
    e. Other measures of poverty, including: family has been unemployed recently, incarcerated parent, student lives with a grandparent, or other known circumstance.
2. Once a student is determined to be eligible for GEAR UP services, the student remains eligible through high school graduation – even if the student's eligibility status changes.
3. Schools may add eligible students to the roster at anytime during the grant cycle. For example:
    a. If a new student enrolls in the district and meets the eligibility criteria, that student is eligible for services.
    b. If a previously non-eligible student's status changes so that the student is now eligible for GEAR UP services, then the student may begin to receive services immediately.

PRIORITY MODEL ELIGIBILITY VERIFICATION

Required Documentation

1. Complete the "School Tracking Form." This form is signed by the building administrator verifying student eligibility. Since this information is confidential, it should be retained in a secure file by the school. Do not send this form to WSAC.
2. Once you've determined eligibility, complete the "School Reporting Form". The form should include all students who are eligible for GEAR UP services during the current school year, whether they have participated or not. Submit this form (see submittal instructions below) to WSAC quarterly on the following dates:

    - **October 15, 2016**
    - **January 15, 2017**
    - **March 15, 2017**
    - **June 15, 2017**

3. Submit the "School Reporting Form" using the WSAC Portal:
    a. Please note, before submitting electronically, you will need to have the verification document signed, scanned, and saved to your computer.
    b. Go to: https://fortress.wa.gov/WSAC/portal
    c. Enter your User Name (your e-mail address) and Password.
    d. Under Common, select *Messages and Files*, and then select *Inbox*.
    e. Click on the *Create a new secure message to WSAC* link on the top right of the page.
    f. Select GEAR UP from the *Select a Program Mailbox* drop down box.
    g. Fill in the *Subject* line accordingly.
    h. Select the file (from your computer) that you want to add to the Attachments field, by clicking on the *Browse...* button.
    i. Add a comment to the blank box, if necessary.
    j. Click on the *Send Message* link on the top of the page.

All information submitted to the WSAC will be kept confidential, and will be used for service eligibility determination only.

Revised-June 14, 2016

PRIORITY MODEL ELIGIBILITY VERIFICATION

Documentation of Eligible Students – Priority Schools Only School Reporting Form To be submitted to WSAC Quarterly: October 15, January 15, March 15, June 15, 2016-2017			
Student Name	**SSID**	**Date Eligible**	**Eligibility confirmed by:**

Attach additional sheets if necessary.

Principal Signature: _____Date:_____

Name of School: _____

Revised-June 14, 2016

PRIORITY MODEL ELIGIBILITY VERIFICATION

Documentation of Eligible Students – Priority Schools Only School Tracking Form 2016-2017 Retain this document for your records – do not submit to WSAC.							
Student Name	Grade Level	Date of Eligibility	Free or Reduced Lunch	TANF or Social Security	Foster Care	Homeless	Other

Attach additional sheets if necessary.

Principal Signature: _____Date:_____

Revised-June 14, 2016

GEAR UP Grads - College Application Entry Instructions

1. Login to the WSAC Portal.
2. Choose the GEAR UP Program from your program choices.
3. Note that *'Students'* is one GEAR UP Portal choices which include *'Activities'*, *'Activity Reports'*, *'Master Calendar'*, *'Professional Development'*, and now *'Students'*.
4. Click on the *'Students'* link.
5. From here you can search for your GEAR UP students either by SSID, First Name, or Last Name. (You will need to type the student's full first or last name out. Unlike adding the student to an activity, it will not self-populate). You can also search without filtering, which will give you all your students enrolled in your school.
6. Click on the student's, linked SSID number.
7. This will take you to the individual student's record.
8. Across the top, you will see three tabs, *'Activities,'* *'College Apps'*, and *'Notes'*.
9. Below that are two tabs, *'Student Activities'* and *'Parent/Family Activities'*.
10. Click on the *'College Apps'* tab.
11. Click on the *'+ Add Application'* button.
12. Much like adding a College Visit Activity, you will add the college the student has applied to by starting to type the name of the college in the *'College'* drop-down box and then the date. Later, if the student is accepted to that college, you will put a check mark in the *'Accepted by College'* box.
13. Click on the *'Save'* button at the bottom right hand corner of the *'College Application'* box.
14. The college the student applied to will now show up on the student's *'College Apps'* tab.
15. From here, you can add multiple applications.
16. In addition, when you click back on the *'Activities'* tab you will have the option of viewing the students individual participation in activities and add follow-up notes in the 'Note' tab .
17. Using the 'Activity Reports' link, you a "Students with Completed College Apps' report.