



## Year 5 Collaborative Work Plan

### **SECTION 1: COLLABORATIVE CONTACT INFORMATION**

Please populate the information requested below for all identified local staff who will contribute to the implementation of the GEAR UP TN project.

#### **District Information:**

District Name: \_\_\_\_\_  
District Website: \_\_\_\_\_  
District Phone Number: \_\_\_\_\_  
District Fax Number: \_\_\_\_\_  
Director of Schools' Name: \_\_\_\_\_  
Director of Schools' Email: \_\_\_\_\_  
District Mailing Address: \_\_\_\_\_

#### **Project Director Information:**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_

#### **GEAR UP TN Site Coordinator(s) Information, if identified**

*(If you have more than two site coordinators, please add additional contact blocks as necessary.)*

Name: \_\_\_\_\_  
Assigned School(s): \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

Name: \_\_\_\_\_  
Assigned School(s): \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_

#### **Fiscal Office Contact:**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: \_\_\_\_\_

**Data Contact:**

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

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

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Student Information System (STAR, PowerSchool, etc.): \_\_\_\_\_

**SECTION 2: DIRECT-SERVICE SCHOOL CONTACT INFORMATION**

Please populate the information requested below for all direct-service schools to be served by the GEAR UP TN project. Feel free to add additional direct-service school blocks as necessary.

School Name: \_\_\_\_\_

Website: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Principal's Name: \_\_\_\_\_

Principal's Email: \_\_\_\_\_

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

School Name: \_\_\_\_\_

Website: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Principal's Name: \_\_\_\_\_

Principal's Email: \_\_\_\_\_

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

School Name: \_\_\_\_\_

Website: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Principal's Name: \_\_\_\_\_

Principal's Email: \_\_\_\_\_

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

### **SECTION 3: ADEQUACY OF FACILITIES AND EQUIPMENT**

#### *Facilities*

Describe the type and adequacy of facilities (locations, amount of space available, other resources available on site) for the GEAR UP TN program and staff.

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#### *Equipment*

List the computer resources (including internet access) and equipment available for GEAR UP staff. Include the quantity for each equipment item and detail if equipment is being purchased with GEAR UP funds or being supplied as match.

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**SECTION 4: GRANT IMPLEMENTATION ACTIVITIES**

Please review the table below outlining grant implementation activities **as outlined in the Year 5 Required Services Chart**. Please detail any expected expenses for grant implementation activities using the table. Not all activities will require a budget estimate.

<b>Year 5 Work Plan</b>					
<b>Proposed Activity</b>	<b>Timeline for Implementation (date)</b>	<b>Total Estimated Cost</b>	<b>Cost Breakdown by Budget Category</b>	<b>Funding Source<sup>1</sup></b>	
				<b>GEAR UP</b>	<b>Other Funds</b>
GEAR UP TN Texting Initiative	Ongoing				
Regular Site Coordinator Meetings	Ongoing				
Completion of Monthly Activity Plan (MAP), Completed Activity Report (CAR), COMPASS data entry, Reimbursement Request, match documentation, and Over \$1000/\$5000 Purchase Requests.	15th of Each Month				
TWO College Access Steering Committee meetings	December 2016 and May 2017				
Update the College Access Steering Committee Roster	September 30, 2016				
Collaborative Annual Performance Report	February 28, 2017				
Travel to the mandatory GEAR UP TN Kickoff meeting	August 2016				
Professional development offered by the GEAR UP TN Central Office	Dates To Be Determined				

<sup>1</sup>Check box as appropriate. If being funded by multiple sources, check both boxes.

## **SECTION 5: COLLABORATIVE BUDGET**

### ***Collaborative Budget – DRAFT as submitted by school district.***

Using the budget worksheet on the following page, enter a detailed budget for Year 5 (July 1, 2016 through June 30, 2017). This budget is for your entire Collaborative. Additional guidelines for the expenditure categories are provided in Appendix G of the Year 5 Work Plan Development Guide. Also, refer to the GEAR UP TN expenditure policies and Pre-Approved Incentives and Cost Limits found in Appendix D of the Work Plan Development Guide. As you plan your budget, take into account the number of students, the required staffing level, the required activities, travel costs and how you will fund your work plan.

**NOTE:** Grantees are required to provide matching funds totaling **80 percent** of their GEAR UP TN annual award in Year 5. Please calculate the matching requirement for your grant and place it in the Grantee Match Requirement line item under the Grantee Match column. Please use the Grant Budget Line-Item Detail (Matching Funds) page to outline details regarding the funds you plan to use as match.

### **HOW TO USE THIS FORM:**

In order to reduce errors and expedite completion of the tables below, we have utilized formulas to link the dollar amounts in the detail portion to the summary table. Please follow the guidelines below to ensure proper functionality:

- 1) **Start with the Line-Item Detail section.** Type your descriptions into the left cell, and each item's total into the adjacent right cell. Add rows as necessary and repeat.
- 2) **Do NOT type directly into the Total portion of the Line-Item Detail tables.** They will sum all amounts in the cells above them, including additional rows you insert. Those totals are what will populate the GRANT BUDGET summary table.
- 3) **Do NOT type directly into the GRANT BUDGET summary table, except for cells that do not have a corresponding Line-Item Detail table** (Insurance, Indirect Costs, etc.). The cells in the GRANT BUDGET table are linked to their related Line-Item Detail, and typing directly into them will disable this functionality.
- 4) After entering amounts and descriptions into the Line-Item Detail tables, **press CTRL+A (select all)**. You'll see the entire document is now highlighted. **Then, press F9 and all formulas will update in both tables**. You can do this any time to see that the addition has taken place for you. Notice that the cells in the summary table that are not linked to a corresponding detail table will remain only zeroes and you can type directly into those cells at any time.

**GRANT BUDGET LINE-ITEM DETAIL (GEAR UP FUNDS):**

<b>Salaries, Benefits &amp; Taxes</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>PROFESSIONAL FEE, GRANT &amp; AWARD</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Supplies, Telephone, Postage &amp; Shipping, Occupancy, Equipment Rental &amp; Maintenance, Printing &amp; Publications</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Travel, Conferences &amp; Meetings</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Specific Assistance To Individuals</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Other Non-Personnel</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Capital Purchase</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

**GRANT BUDGET LINE-ITEM DETAIL (MATCHING FUNDS):**

<b>Salaries, Benefits &amp; Taxes</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>PROFESSIONAL FEE, GRANT &amp; AWARD</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Supplies, Telephone, Postage &amp; Shipping, Occupancy, Equipment Rental &amp; Maintenance, Printing &amp; Publications</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Travel, Conferences &amp; Meetings</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Specific Assistance To Individuals</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Other Non-Personnel</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>

<b>Capital Purchase</b>	<b>AMOUNT</b>
Specific, Descriptive, Detail (Repeat Row As Necessary)	
<b>TOTAL</b>	<b>0</b>



**SECTION 6: SIGNATURE PAGE**

The designees below certify that, to the best of their knowledge, the information in the work plan above is correct.

**Director of Schools**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**GEAR UP TN Project Director**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name