35th Annual Seminar on Relations with the U.S. Department of Education

Virtual Meeting
Monday, March 23, 2020
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Meeting Information
35th Annual Seminar on Relations with the U.S. Department of Education
Virtual Meeting
Monday, March 23, 2020

10:00 a.m. – 10:30 a.m.  Welcome and Setting the Stage
Maureen Hoyler, President
Council for Opportunity in Education

Kimberly Jones, Executive Vice President
Council for Opportunity in Education

Angelica Vialpando, Vice President, Program and Professional Development
Council for Opportunity in Education

10:45 a.m. – 11:15 a.m.  Serving Our Neediest Students in a Time of Crisis
Robert King, Assistant Secretary for Postsecondary Education
U.S. Department of Education

11:30 a.m. – 12:30 p.m.  Update for College Access and Success Professionals
Chris McCaghren, Deputy Assistant Secretary for Higher Education Programs
U.S. Department of Education

Linda Byrd-Johnson, Senior Director, Student Service
U.S. Department of Education

12:45 p.m. – 1:45 p.m.  Update from Pre-College Program Division
Linda Byrd-Johnson, Senior Director, Student Service
U.S. Department of Education

Craig Pooler, GEAR UP and Talent Search Division Director
U.S. Department of Education

Gaby Watts, Upward Bound and Educational Opportunity Center Division Director
U.S. Department of Education
2:00 p.m. – 3:00 p.m. Update from Collegiate Program Division
Linda Byrd-Johnson, Senior Director, Student Service
U.S. Department of Education

James Davis, Undergraduate Programs Division Director
U.S. Department of Education

ReShone Moore, Graduate and Special Focus Program Division Director
U.S. Department of Education

3:15 p.m. – 4:15 p.m. Creating a Policy and Procedures Manual
Lucy Jones, Former TRIO Director

4:30 p.m. – 5:30 p.m. Wrap Up and Additional Questions from the TRIO Community
Maureen Hoyler, President
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TRIO Programs

- Educational Opportunity Centers
- Ronald E. McNair Postbaccalaureate Achievement
- Student Support Services
- Talent Search
- Training Program for Federal TRIO Programs Staff
- Upward Bound
- Upward Bound Math-Science
- Veterans Upward Bound

Organization and Staff

- Student Service Organization Structure

The Federal TRIO Programs (TRIO) are Federal outreach and student services programs designed to identify and provide services to individuals from disadvantaged backgrounds. TRIO includes eight programs targeted to serve and assist low-income individuals, first-generation college students, and individuals with disabilities to progress through the academic pipeline from middle school to postbaccalaureate programs. TRIO also includes a training program for directors and staff of TRIO projects.

The recipients of the grants, depending on the specific program, are institutions of higher education, public and private agencies, and organizations including community-based organizations with experience in serving disadvantaged youth and secondary schools. Combinations of such institutions, agencies, and organizations may also apply for grants. These entities plan, develop, and carry out the services for students. While individual students are served by these entities, they may not apply for grants under these programs. Additionally, in order to be served by one of these programs, a student must be eligible to receive services and be accepted into a funded project that serves the institution or school that student is attending or the area in which the student lives.

News and Information

- "Go Live" Dates for TRIO Annual Performance Reports (Reporting Year 2018-19)
  - November 1, 2019 - Talent Search, Educational Opportunity Centers, Student Support Services
  - Early January 2020 - Upward Bound, Upward Bound Math-Science
  - Mid-to-late January 2020 - Ronald E. McNair Postbaccalaureate Achievement
  - Mid March 2020 - Veterans Upward Bound
• The Federal TRIO Programs 2017 Low-Income Levels is available.

Recent TRIO Reports
• Fast Facts Report for the Student Support Services Program (PDF, 302K)
• Fast Facts Report for the Talent Search Program (PDF, 317K)
• Upward Bound and Upward Bound Math-Science Program Postsecondary Outcomes Report (PDF, 3.23MB)

New TRIO Reports Coming Soon
• Fast Facts Report for the Ronald E. McNair Postbaccalaureate Achievement Program
• Ronald E. McNair Postbaccalaureate Achievement Program: An Analysis of McNair Research Doctorate Recipients Using the Survey of Earned Doctorates

Dear Colleague Letter: Developmental Education (MS Word, 82K)
• The U.S. Department Education implements competitive grant programs that provide funding to colleges and nonprofit organizations to assist veterans in enrolling in and completing a program of postsecondary education. Find out more about programs that support military veterans.
• Press Release: ED Awards $48 Million in TRIO Educational Opportunity Centers Grants to Improve Adult College Readiness
• Grantmaking at ED, a non-technical summary of ED’s discretionary grant process and the laws and regulations that govern it.
• Letter to TRIO and GEAR UP programs’ project directors about an ED and HHS collaborative for disconnected youth (MS Word, 76K)

A new report on Persistence and Completion in Postsecondary Education of Participants in the TRIO Student Support Services Program is available.

Maps
• Map of TRIO’s Footprint in 2017-18: Project Sites Throughout the U.S. and Outlying Territories
• Map of Talent Search Target Schools

Reference Documents

TRIO History
Legislation, Regulations, and Guidance
• Legislation for TRIO Programs (MS Word (217K) | PDF (188K)
• Legislation Authorizing the SSS Grant Aid (MS Word, 21K)
• Regulations
• Indirect Cost Guidance
• Guidance on the Federal Requirements for Cash Drawdowns: (1) Memo to ED Discretionary Grantees (MS Word (86K)

Higher Education Opportunity Act (P.L. 110-315)

Low-Income Levels
• Current-Year Low-Income Levels
• Prior-Year Low-Income Levels

TRIO Program Reports
• A Profile of the Federal TRIO Programs and Child Care Access Means Parents in School Program: 2008 (MS Word (446K) | PDF (267K)
• Veterans Upward Bound
• Upward Bound Math-Science
• Upward Bound
• Student Support Services
• Talent Search
• Ronald E. McNair Postbaccalaureate Achievement
• Educational Opportunity Centers
Program Evaluations

Student Support Services:

National Evaluation of Student Support Services: Examination of Student Outcomes After Six Years (2010)
- Abstract PDF (37.0K)
- Full Report PDF (1.97M) | MS Word (2.30M)

Upward Bound:
- Highlights MS Word (28K)
- Full Report MS Word (1.3M)
- Appendix A MS Word (6.7M)

The Impact of Regular Upward Bound: Results from the Third Follow-up Data Collection (2004)
- Report Highlights
- Complete Report: PDF (842 KB) | MS Word (995 KB)

Upward Bound Math-Science:

- Executive Summary
- Complete Report: PDF (9 MB) | Word (4.6 MB)

McNair:
The Educational and Employment Outcomes of The Ronald E. McNair Postbaccalaureate Achievement Program Alumni (2008)
- Highlights: PDF (27 KB) | MS Word (59 KB)
- Full Report: PDF (2.1 MB) | MS Word (1.5 MB)

Talent Search:

- Report Highlights
- Complete report: PDF (1 MB)

- Complete Report Website

Other Resources
- TRIO 50th Anniversary Fact Sheet (PDF, 666K). TRIO 50th Anniversary Retrospective (an ED YouTube video best viewed in Google Chrome, 7:51 minutes)
- 50th Anniversary of the Federal TRIO Programs: Symposium: Thursday, August 21, 2014; 9:00 a.m. – 12:00 p.m. Live stream can be accessed on ED Stream. For those grantees on the west coast and in the insular areas, the event will be stored and you will be able to listen to the symposium at a more convenient time on that day.

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Student Service Home
# Federal TRIO Programs - UB and EOC Division Staff Directory

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<th>Program Specialist</th>
<th>State Assignments</th>
</tr>
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<tbody>
<tr>
<td>Rachael Couch</td>
<td>Arkansas, Minnesota, Virginia</td>
</tr>
<tr>
<td>202-453-6078</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:rachael.couch@ed.gov">rachael.couch@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Sharon Easterling</td>
<td>Alabama, Pennsylvania, South Carolina</td>
</tr>
<tr>
<td>202-453-7425</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:sharon.easterling@ed.gov">sharon.easterling@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Joyce Fadahunsi</td>
<td>Alaska, Connecticut, Delaware, Illinois, New Jersey, New Mexico, Oregon, South</td>
</tr>
<tr>
<td>202-453-7673</td>
<td>Dakota, Trust Territories, Utah, Vermont</td>
</tr>
<tr>
<td><a href="mailto:joyce.fadahunsi@ed.gov">joyce.fadahunsi@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Kenneth Foushee</td>
<td>Illinois (VUB), Massachusetts, Montana, Nevada, New York, Tennessee (VUB)</td>
</tr>
<tr>
<td>202-453-7417</td>
<td></td>
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<tr>
<td><a href="mailto:kenneth.foushee@ed.gov">kenneth.foushee@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Tameika Holly</td>
<td>Missouri, Texas (UB &amp; VUB)</td>
</tr>
<tr>
<td>202-453-6330</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:tameika.holly@ed.gov">tameika.holly@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Ashley Jackson</td>
<td>California (UB)</td>
</tr>
<tr>
<td>202-453-7297</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:ashley.jackson@ed.gov">ashley.jackson@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Tonja Lark-Willis</td>
<td>District of Columbia, Georgia, Hawaii, Kentucky, Maryland, Missouri (EOC), Texas</td>
</tr>
<tr>
<td>202-453-7619</td>
<td>(EOC &amp; UBMS)</td>
</tr>
<tr>
<td><a href="mailto:tonja.lark@ed.gov">tonja.lark@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Helen Seide</td>
<td>Colorado, Idaho, Kansas, Maine, Mississippi, New Hampshire, Wyoming</td>
</tr>
<tr>
<td>202-453-6223</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:helen.seide@ed.gov">helen.seide@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Princess Uzzelle</td>
<td>Arizona, Guam, Iowa, Nebraska, North Dakota, Michigan, Puerto Rico</td>
</tr>
<tr>
<td>202-453-7569</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:princess.uzzelle@ed.gov">princess.uzzelle@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Ken Waters</td>
<td>California (UBMS, EOC &amp; VUB), North Carolina, West Virginia</td>
</tr>
<tr>
<td>202-453-6273</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:ken.waters@ed.gov">ken.waters@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Karen Wilson</td>
<td>Rhode Island, Tennessee, Washington, Wisconsin</td>
</tr>
<tr>
<td>202-453-6186</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:karen.wilson@ed.gov">karen.wilson@ed.gov</a></td>
<td></td>
</tr>
<tr>
<td>Ben Withhoeft</td>
<td>Indiana, Louisiana, Ohio, Oklahoma</td>
</tr>
<tr>
<td>202-453-7576</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:ben.withhoeft@ed.gov">ben.withhoeft@ed.gov</a></td>
<td></td>
</tr>
</tbody>
</table>
Contacts

Key Staff

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- Mose Cartier, Program Specialist, (202) 453-7373, mose.cartier@ed.gov
  Texas, Illinois, Georgia, Florida

- David Howe, Program Specialist, (202) 453-7687, david.howe@ed.gov

- William Sarrano, Program Specialist, (202) 453-7893, william.sarrano@ed.gov
  California, Maine, Oklahoma

Student Service Organizational Directory

Mailing Address

Office of Federal TRIO Programs
U.S. Department of Education, OPE
Higher Education Programs
400 Maryland Avenue, S.W., 5th floor
Washington, DC 20202
Mail Stop LBJ-2- 251-05
E-mail: OPE_TRIO@ed.gov
Fax: (202) 260-7464

Last Modified: 09/18/2019
PROGRAMS
Student Support Services Program

Contacts

Key Staff
Division Director
James Davis, (202) 453-7814, james.davis@ed.gov
Staff Assignments by State: PDF (367K)

Mailing Address
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Higher Education Programs
Student Support Services
400 Maryland Avenue, S.W.
Mail Stop LBJ 2-261-05
Washington, DC 20202

Email Address
OPE_TRIO@ed.gov

Project Assignments

<table>
<thead>
<tr>
<th>Program Specialist</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shakir Davy, 202-453-7792</td>
<td>Arkansas, Idaho, Mississippi, Pennsylvania, South Carolina</td>
</tr>
<tr>
<td>Mary Dominguez, 202-453-6180</td>
<td>California, Kentucky</td>
</tr>
<tr>
<td>Antoinette Edwards, 202-453-7121</td>
<td>Colorado, Iowa, Louisiana, Maryland</td>
</tr>
<tr>
<td>Denise Rosier, 202-453-7719</td>
<td>Indiana, Massachusetts, Maine, North Dakota, Nebraska, New Jersey, New Mexico, Oklahoma</td>
</tr>
<tr>
<td>Winston Skerrett, 202-453-7605</td>
<td>Arizona, Connecticut, Delaware, Missouri, Tennessee, Wisconsin, West Virginia</td>
</tr>
<tr>
<td>Brandon Webber, 202-453-7944</td>
<td>Georgia, Guam, Hawaii, Illinois, Puerto Rico, Rhode Island, South Dakota, Virginia</td>
</tr>
<tr>
<td>Harold Wells, 202-453-5131</td>
<td>Michigan, Montana, Ohio, Utah</td>
</tr>
</tbody>
</table>
ABOUT EDUCATION / OVERVIEW
Ronald E. McNair Postbaccalaureate Achievement Program

Contacts

Key Staff

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Acting Director, Graduate & Special Focus Programs
U.S. Department of Education, OPE
400 Maryland Avenue, S.W.
Mail Stop LBJ 2-261-05
Washington, DC 20202
Telephone: 202-453-6060

<table>
<thead>
<tr>
<th>Program Specialist</th>
<th>State Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ashley Hillary</td>
<td>Indiana, Nebraska, Pennsylvania, Wisconsin</td>
</tr>
<tr>
<td>Rebecca Ell</td>
<td>Arizona, New Hampshire, Utah, West Virginia</td>
</tr>
<tr>
<td>Suzanne Ulmer</td>
<td>Alabama, Georgia, Illinois, Iowa, Kansas, Louisiana, Mississippi, Missouri, New Mexico, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia</td>
</tr>
</tbody>
</table>

Mailing Address:

Federal TRIO Programs
U.S. Department of Education, OPE
Higher Education Programs
Ronald E. McNair Postbaccalaureate Achievement Program
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Mail Stop LBJ 2-261-05
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Student Service Organizational Directory
Training Program for Federal TRIO Programs

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Higher Education Programs
Federal TRIO Programs
Training Program for Federal TRIO Programs Staff
400 Maryland Avenue, S.W.
Mail Stop LEJ 2-261-05
Washington, DC 20202

Student Service Organizational Directory

TRIO Home
### Federal TRIO Programs
#### Current-Year Low-Income Levels

(Effective January 15, 2020 until further notice)

<table>
<thead>
<tr>
<th>Size of Family Unit</th>
<th>48 Contiguous States, D.C., and Outlying Jurisdictions</th>
<th>Alaska</th>
<th>Hawaii</th>
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<tr>
<td>1</td>
<td>$19,140</td>
<td>$23,925</td>
<td>$22,020</td>
</tr>
<tr>
<td>2</td>
<td>$25,860</td>
<td>$32,325</td>
<td>$29,745</td>
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<td>3</td>
<td>$32,580</td>
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<td>$59,460</td>
<td>$74,325</td>
<td>$68,370</td>
</tr>
<tr>
<td>8</td>
<td>$66,180</td>
<td>$82,725</td>
<td>$76,095</td>
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</tbody>
</table>

For family units with more than eight members, add the following amount for each additional family member: $6,720 for the 48 contiguous states, the District of Columbia and outlying jurisdictions; $8,400 for Alaska; and $7,725 for Hawaii.

The term "low-income individual" means an individual whose family's taxable income for the preceding year did not exceed 150 percent of the poverty level amount.

The figures shown under family income represent amounts equal to 150 percent of the family income levels established by the Census Bureau for determining poverty status. The 2020 poverty guidelines are in effect as of January 15, 2020. Federal Register notice was published January 17, 2020.
PPTs & Supplemental Materials
One Person’s Basic Rules
for the
2020 EOC and Talent Search Competitions

1. The coronavirus pandemic means that as of today, everything is in flux.

2. Nevertheless, this is a long-distance run. Winning requires thought, persistence and luck. Start now!

3. No person should attempt to write either of these proposals by him or herself. Involve others in your Institution or Agency, as well as your staff.

4. **Timing:** The U.S. Department of Education has publicly stated their intention to have either/both EOC and Talent Search proposals due in the Fall. This would seem to require that the first draft application package be available in August.

5. **Money:** Right now, it is too early to determine how much new money and how many new programs will be funded in Fiscal Year (FY) 2020 (Program Year (PY) 2021-2022).

6. **Questions:** The questions were finalized in the 2015 competition so the basic questions will not change.

7. **Pages:** It is anticipated that the number of pages will be 65 for Talent Search and 50 for EOC.

8. **Number of Schools:** In Talent Search, think about reducing the number of schools you serve. This may not be politically possible.

9. **YOU MUST ANSWER EVERY QUESTION.** Your data does not have to be perfect to answer the question.

10. **Competitive Preference Priorities:** This is one way the Administration has of putting its mark on a competition. COE will fight to assure that everyone has an equal chance to get these points. You absolutely must write for them. You cannot afford to lose any of these points.

11. It is very tempting to think that the major work of the proposal is the research and the writing. This is simply not the case. In my view, the major work of these proposals falls in three categories: (1) thought about the design; (2) political work with other currently funded programs in your area to assure that your combined design is coherent locally; and (3) political work within your institution or agency to assure that your program is aligned with institutional priorities and receives distinctive support from the sponsoring institution or agency.

12. COE is offering a number of sessions (some free) on using tracking data to improve your college access program. Try to take advantage of these sessions. Doing so will assist you in developing a stronger Evaluation section.

13. Be familiar with your state’s college and career ready standards. Meet with your local School Boards and Administrations to determine how your programs can assist them in helping more students meet those standards.
14. The process of developing a slate is as follows:

- Prior experience is calculated by an outside contractor on the basis of the APR’s;
- Submitted proposals are reviewed by ED staff to determine if they comply with requirements set by ED (budget limitations, page length, etc.)
- Submitted proposals that meet these requirements are then sent to three readers (a panel) and read separately by each of those readers;
- Each reader scores every proposal s/he reads independently;
- The readers are then brought to Washington and the proposals are “paneled” i.e. the three readers go through their technical review forms together with a program specialist who is expected to make sure that there are not huge discrepancies between members of a panel, that the comments make sense and are written in grammatical English, that all questions are answered, etc.
- After the paneling, the scores are averaged, prior experience scores are added to the proposal score, and the applications are arranged from highest to lowest;
- ED funds down the slate – according to the published criteria – until it runs out of money. Then the appeals process kicks in.

15. Many Institutions and Agencies have lost all the points needed to be discontinued by the end of the Objectives section. You cannot afford to lose points in the Need or Objectives section.

16. The point in Need is to look BAD, looking good is the worst possible thing you can do for yourself.

17. In Need, talk about students as human beings, not as if you are writing a report for enrollment management.

18. In Plan of Operation, start from scratch. Don’t write just to justify your current program. Think carefully about the students or clients you described in the Need section – and try to make sure that you are describing the best possible program you can offer, given the resources you have available to you. This may mean a different staffing pattern.

19. There are a lot of basic questions:

- Do you expect students to remain in the program over time?
- Do you have expected outcomes for participation?
- Do you provide all students the same level of service?
- How many schools should you serve?

The answer to these questions depends on local context.
20. Think more about the bridging process to college than you have in the past. Think more about what you do after you find, in tracking, that a student has dropped out of college.

21. An “in-word” is “Evidence-based” practice. Use it but don’t overuse it.

22. As you consider Institutional Commitment, you have a number of months to secure commitments of additional resources from your institution or agency. Everything you can secure helps your application. Begging isn’t fun, but it is an essential part of advocacy. Going into this competition with meager institutional commitment puts your application at risk. If you are trying to get funding for a new application, depth of institutional commitment is essential. START ON THIS NOW!

23. In Evaluation, expect to include a logic model.

24. The coronavirus situation is changing everything on a daily basis. For both EOC’s and Talent Search, it may mean a significant increase in eligible populations. Another example, the pandemic has put a brighter spotlight on internet connectivity. As you experience this crisis, think through what more you would like to do for the students/clients you serve.

Good luck!

Maureen Hoyler
President
Council for Opportunity in Education

March 2020
# Student Successes

<table>
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<tr>
<th>Colleges At Which Your Former Participants Enroll</th>
<th>Number of Students</th>
<th>Retention to Second Year</th>
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</table>
COMPETITION HIGHLIGHTS

1. **Program applications for FY 2021 must be submitted electronically using Grants.gov.** You are urged to acquaint yourself with the requirements of Grants.gov early as the registration procedures may require 5 or more days to complete. A more thorough discussion is included later in this application package. Grants.gov is accessible through its portal page at: [https://www.Grants.gov](https://www.Grants.gov). The requirements for obtaining an exception to the electronic submission requirement are included in the Notice for FY 2021. If you think you may need an exception, you are urged to review the requirements promptly.

2. **REGISTER EARLY** – Grants.gov registration involves many steps including registration on SAM (www.sam.gov) which may take approximately one week to complete, but could take upwards of several weeks to complete, depending upon the completeness and accuracy of the data entered into the SAM database by an applicant. You may begin working on your application while completing the registration process, but you cannot submit an application until all of the registration steps are complete. Please note that once your SAM registration is active, it will take 24-48 hours for the information to be available in Grants.gov.

3. Grants.gov does not allow applicants to “un-submit” applications. Therefore, if you discover that changes or additions are needed once your application has been accepted and validated by the Department, you must “re-submit” the application. You should know that if the Department receives duplicate applications, we will accept and process the application with the latest “date/time received” validation.

4. Please note that you must submit your application by 11:59:59 p.m. (Eastern Time) on or before the application deadline date. Late applications will not be accepted. **We suggest that you submit your application several days before the deadline.** The Department is required to enforce the established deadline to ensure fairness to all applicants. No changes or additions to an application will be accepted after the deadline date and time.

5. Electronic submission of applications is required; therefore, you must submit an electronic application unless you follow the procedures outlined in the Notice for FY 2021 and qualify for one of the exceptions to the electronic submission requirement.

6. We recommend that you limit the application narrative, which includes the budget narrative, to the equivalent of no more than XX pages.

7. **All attachments must be in a Portable Document Format (PDF) or Microsoft Word. Other types of files will not be accepted.** Please note, once you download an application from Grants.gov, you will be working offline and saving data on your computer. It is important to note where you are saving the Grants.gov file on your computer. You will need to log on to Grants.gov to upload and submit the application. You must provide the DUNS number that was used when your organization registered with the System for Award Management (SAM).
To facilitate your use of Grants.gov, this document includes important submission procedures you need to be aware of to ensure your application is received in a timely manner and accepted by the Department of Education.

**Browser Support**

The latest versions of Microsoft Internet Explorer (IE), Mozilla Firefox, Google Chrome, and Apple Safari are supported for use with Grants.gov. However, these web browsers undergo frequent changes and updates, so we recommend you have the latest version when using Grants.gov. Legacy versions of these web browsers may be functional, but you may experience issues.

For additional information or updates, please see the Grants.gov Browser information in the Applicant FAQs: [http://www.grants.gov/web/grants/applicants/applicant-faqs.html#browser](http://www.grants.gov/web/grants/applicants/applicant-faqs.html#browser).

**ATTENTION – Workspace, Adobe Forms and PDF Files**

Grants.gov applicants can apply online using Workspace. Workspace is a shared, online environment where members of a grant team may simultaneously access and edit different web forms within an application. For each funding opportunity announcement (FOA), you can create individual instances of a workspace.

Below is an overview of applying on Grants.gov. For access to complete instructions on how to apply for opportunities, refer to:


1) Create a Workspace: Creating a workspace allows you to complete it online and route it through your organization for review before submitting.

2) Complete a Workspace: Add participants to the workspace to work on the application together, complete all the required forms online or by downloading PDF versions, and check for errors before submission. The Workspace progress bar will display the state of your application process as you apply. As you apply using Workspace, you may click the blue question mark icon near the upper-right corner of each page to access context-sensitive help.

a. Adobe Reader: If you decide not to apply by filling out web forms, you can download individual PDF forms in Workspace. The individual PDF forms can download and saved to your local device storage, network drive(s), or external drives, then accessed through Adobe Reader.
NOTE: Visit the Adobe Software Compatibility page on Grants.gov to download the appropriate version of the software at:


b. Mandatory Fields in Forms: In the forms, you will note fields marked with an asterisk and a different background color. These fields are mandatory fields that must be completed to successfully submit your application.

c. Complete SF-424 Fields First: The forms are designed to fill in common required fields across other forms, such as the applicant name, address, and DUNS Number. Once it is completed, the information will transfer to the other forms.

3) Submit a Workspace: An application may be submitted through Workspace by clicking the Sign and Submit button on the Manage Workspace page, under the Forms tab. Grants.gov recommends submitting your application package at least 24-48 hours prior to the close date to provide you with time to correct any potential technical issues that may disrupt the application submission.

4) Track a Workspace Submission: After successfully submitting a workspace application, a Grants.gov Tracking Number (GRANTXXXXXXX) is automatically assigned to the application. The number will be listed on the Confirmation page that is generated after submission. Using the tracking number, access the Track My Application page under the Applicants tab or the Details tab in the submitted workspace.

For additional training resources, including video tutorials, refer to:


Helpful Reminders

1) REGISTER EARLY – Grants.gov registration involves many steps including registration on SAM (www.sam.gov) which may take approximately one week to complete, but could take upwards of several weeks to complete, depending upon the completeness and accuracy of the data entered into the SAM database by an applicant. You may begin working on your application while completing the registration process, but you cannot submit an application until all of the registration steps are complete. Please note that once your SAM registration is active, it will take 24-48 hours for the information to be available in Grants.gov, and before you can submit an application through Grants.gov. For detailed information on the registration steps, please go to:


[Note: Your organization will need to update its SAM registration annually.]

Primary information about SAM is available at www.sam.gov. However, to further assist you with obtaining and registering your DUNS number and TIN in SAM or updating your existing SAM account, the Department of Education has prepared a SAM.gov Tip Sheet which you can find at: http://www2.ed.gov/fund/grant/apply/sam-faqs.html.
2) **SUBMIT EARLY** – We strongly recommend that you do not wait until the last day to submit your application. Grants.gov will put a date/time stamp on your application and then process it after it is fully uploaded. The time it takes to upload an application will vary depending on a number of factors including the size of the application and the speed of your Internet connection, and the time it takes Grants.gov to process the application will vary as well. If Grants.gov rejects your application (see step three below), you will need to resubmit successfully to Grants.gov before 11:59:59 p.m. Eastern Time on the deadline date.

**Note:** To submit successfully, you must provide the DUNS number on your application that was used when you registered as an Authorized Organization Representative (AOR) on Grants.gov. This DUNS number is typically the same number used when your organization registered with the SAM. If you do not enter the same DUNS number on your application as the DUNS you registered with, Grants.gov will reject your application.

3) **VERIFY SUBMISSION IS OK** – You will want to verify that Grants.gov received your application submission on time and that it was validated successfully. To see the date/time your application was received, log in to Grants.gov and click on the Track My Application link. For a successful submission, the date/time received should be earlier than 11:59:59 p.m. Eastern Time on the deadline date, AND the application status should be: Validated, Received by Agency, or Agency Tracking Number Assigned. Once the Department of Education receives your application from Grants.gov, an Agency Tracking Number (PR/award number) will be assigned to your application and will be available for viewing on Grants.gov’s Track My Application link.

If the date/time received is later than 11:59:59 p.m. Eastern Time on the deadline date, your application is late. If your application has a status of “Received” it is still awaiting validation by Grants.gov. Once validation is complete, the status will either change to “Validated” or “Rejected with Errors.” If the status is “Rejected with Errors,” your application has not been received successfully.

Some of the reasons Grants.gov may reject an application can be found on the Grants.gov site: http://www.grants.gov/web/grants/applicants/encountering-error-messages.html.

For more detailed information on troubleshooting Adobe errors, you can review the Adobe Reader Software Tip Sheet at: http://www.grants.gov/web/grants/applicants/adobe-software-compatibility.html.

If you discover your application is late or has been rejected, please see the instructions below. Note: You will receive a series of confirmations both online and via e-mail about the status of your application. Please do not rely solely on e-mail to confirm whether your application has been received timely and validated successfully.

**Submission Problems – What should you do?**

If you have problems submitting to Grants.gov before the closing date, please contact Grants.gov Customer Support at 1-800-518-4726 or support@grants.gov or access the Grants.gov Self-Service Knowledge Base web portal at: https://grants-portal.psc.gov/Welcome.aspx?pt=Grants.

If electronic submission is required, you must submit an electronic application before 11:59:59 p.m. Eastern Time, unless you follow the procedures in the Federal Register notice and qualify for one of the exceptions to the electronic submission requirement and submit, no later than two weeks before the...
application deadline date, a written statement to the Department that you qualify for one of these exceptions. If electronic submission is optional and you have problems that you are unable to resolve before the deadline date and time for electronic applications, please follow the transmittal instructions for hard copy applications in the Federal Register notice and get a hard copy application postmarked by midnight on the deadline date. (See the Federal Register notice for detailed instructions.)

Helpful Hints When Working with Grants.gov


Dial-Up Internet Connections

When using a dial up connection to upload and submit your application, it can take significantly longer than when you are connected to the Internet with a high-speed connection, e.g. cable modem/DSL/T1. While times will vary depending upon the size of your application, it can take a few minutes to a few hours to complete your grant submission using a dial up connection. If you do not have access to a high-speed connection and electronic submission is required, you may want to consider following the instructions in the Federal Register notice to obtain an exception to the electronic submission requirement no later than two weeks before the application deadline date. (See the Federal Register notice for detailed instructions.)

Attaching Files – Additional Tips

Please note the following tips related to attaching files to your application:

- When you submit your application electronically, you must upload any narrative sections and all other attachments to your application as files in either Portable Document Format (PDF) or Microsoft Word. Although applicants have the option of uploading any narrative sections and all other attachments to their application in either PDF or Microsoft Word, we recommend applicants submit all documents as read-only flattened PDFs, meaning any fillable PDF files must be saved and submitted as non-fillable PDF files and not as interactive or fillable PDF files, to better ensure applications are processed in a more timely, accurate, and efficient manner.

- Grants.gov cannot process an application that includes two or more files that have the same name within a grant submission. Therefore, each file uploaded to your application package should have a unique file name.

- When attaching files, applicants should follow the guidelines established by Grants.gov on the size and content of file names. Uploaded file names must be fewer than 50 characters, and, in general, applicants should not use any special characters. However, Grants.gov does allow for the following UTF-8 characters when naming your attachments: A-Z, a-z, 0-9, underscore, hyphen, space, period, parenthesis, curly braces, square brackets, ampersand, tilde, exclamation point, comma, semi colon, apostrophe, at sign, number sign, dollar sign, percent sign, plus sign, and equal sign. Applications submitted that do not comply with the Grants.gov guidelines will be rejected at Grants.gov and not forwarded to the Department.
Applicants should limit the size of their file attachments. Documents submitted that contain graphics and/or scanned material often greatly increase the size of the file attachments and can result in difficulties opening the files. For reference, the average discretionary grant application package with all attachments is less than 5 MB. Therefore, you may want to check the total size of your package before submission.
APPLICATION TRANSMITTAL INSTRUCTIONS

ATTENTION ELECTRONIC APPLICANTS: Please note that you must follow the Application Procedures as described in the Federal Register Notice announcing the grant competition.

This program requires the electronic submission of applications; specific requirements and waiver instructions can be found in the Federal Register Notice.

According to the instructions found in the Federal Register Notice, those requesting and qualifying for an exception to the electronic submission requirement may submit an application by mail, commercial carrier or by hand delivery.

If you want to apply for a grant and be considered for funding, you must meet the following deadline requirements:

Applications Submitted Electronically

You must submit your grant application through the Internet using the software provided on the Grants.gov Web site (http://www.grants.gov) by 11:59:59 p.m. (Eastern Time) on or before the deadline date.

If you submit your application through the Internet via the Grants.gov Web site, you will receive an automatic acknowledgement when we receive your application.

For more information on using Grants.gov, please refer to the “Notice Inviting Applications” that was published in the Federal Register or visit http://www.grants.gov.

Submission of Paper Applications by Mail:

If you submit your application in paper format by mail (through the U.S. Postal Service or a commercial carrier), you must mail the original and two copies of your application, on or before the application deadline date, to the Department at the following address:

U.S. Department of Education
Application Control Center
Attention: 84.042A
LBJ Basement Level 1,
400 Maryland Avenue SW,
Room 268-24
Washington, DC 20202–4260.
You must show proof of mailing consisting of one of the following:
(1) A legibly dated U.S. Postal Service postmark.
(2) A legible mail receipt with the date of mailing stamped by the U.S. Postal Service.
(3) A dated shipping label, invoice, or receipt from a commercial carrier.
(4) Any other proof of mailing acceptable to the Secretary of the U.S. Department of Education.

If you mail your application through the U.S. Postal Service, we do not accept either of the following as proof of mailing:

1. A private metered postmark.
2. A mail receipt that is not dated by the U.S. Postal Service.

An applicant should note that the U.S. Postal Service does not uniformly provide a dated postmark. Before relying on this method, an applicant should check with its local post office.

Special Note: Due to potential disruption to normal mail delivery, the Department encourages you to consider using an alternative delivery method (for example, a commercial carrier, such as Federal Express or United Parcel Service; U.S. Postal Service Express Mail; or a courier service) to transmit your application for this competition to the Department. If you use an alternative delivery method, please obtain the appropriate proof of mailing under “Applications Delivered by Mail,” and then follow the instructions for “Applications Delivered by Hand.”

Submission of Paper Applications by Hand Delivery:

If you qualify for an exception to the electronic submission requirement, you (or a courier service) may deliver your paper application to the Department by hand. You must deliver the original and two copies of your application by hand, on or before the application deadline date, to the Department at the following address:

U.S. Department of Education
Attention: CFDA Number 84.042A
400 Maryland Avenue, SW
Room 268-24
Washington, DC 20202-4260

Note for Mail or Hand Delivery of Paper Applications: If you mail or hand deliver your application to the Department—

1. You must indicate on the envelope, and—if not provided by the Department—in Item 11 of the SF 424, the CFDA number, including suffix letter, if any, of the competition under which you are submitting your application; and

2. The Application Control Center will mail to you a notification of receipt of your grant application. If you do not receive this notification within 15 business days from the application deadline date, you should call the U.S. Department of Education Application Control Center at (202)245-6288.
Application Control Center Hours of Operation

The Application Control Center accepts application deliveries daily between 8:00 a.m. and 4:30 p.m. (Washington, D.C. time) except Saturdays, Sundays, and Federal holidays.

Late Applications

If your application is late, we will notify you that we will not consider the application.
PART 644—EDUCATIONAL OPPORTUNITY CENTERS

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AUTHORITY: 20 U.S.C. 1070a-11 and 1070a-16, unless otherwise noted.

SOURCE: 59 FR 2658, Jan. 18, 1994, unless otherwise noted.

Subpart A—General

§644.1  What is the Educational Opportunity Centers program?

The Educational Opportunity Centers program provides grants for projects designed—

(a) To provide information regarding financial and academic assistance available to individuals who desire to pursue a program of postsecondary education;

(b) To provide assistance to individuals in applying to admission to institutions that offer programs of postsecondary education, including assistance in preparing necessary applications for use by admissions and financial aid officers; and

(c) To improve the financial and economic literacy of participants on topics such as—

(1) Basic personal income, household money management, and financial planning skills; and

(2) Basic economic decision-making skills.

(Authority: 20 U.S.C. 1070a-16)


§644.2  Who is eligible for a grant?

The following entities are eligible for a grant to carry out an Educational Opportunity Centers project:

(a) An institution of higher education.

(b) A public or private agency or organization, including a community-based organization with experience in serving disadvantaged youth.

(c) A secondary school.
(d) A combination of the types of institutions, agencies, and organizations described in paragraphs (a), (b), and (c) of this section.

(Authority: 20 U.S.C. 1070a-11)


§644.3 Who is eligible to participate in a project?

(a) An individual is eligible to participate in an Educational Opportunity Centers project if the individual meets all of the following requirements:

(1)(i) Is a citizen or national of the United States;

(ii) Is a permanent resident of the United States;

(iii) Is in the United States for other than a temporary purpose and provides evidence from the Immigration and Naturalization Service of his or her intent to become a permanent resident;

(iv) Is a permanent resident of Guam, the Northern Mariana Islands, or the Trust Territory of the Pacific Islands (Palau); or

(v) Is a resident of the Freely Associated States—the Federated States of Micronesia or the Republic of the Marshall Islands.

(2)(i) Is at least 19 years of age; or

(ii) Is less than 19 years of age, and the individual cannot be appropriately served by a Talent Search project under 34 CFR part 643, and the individual's participation would not dilute the Educational Opportunity Centers project's services to individuals described in paragraph (a)(2)(i) of this section.

(3) Expresses a desire to enroll, or is enrolled, in a program of postsecondary education, and requests information or assistance in applying for admission to, or financial aid for, such a program.

(b) A veteran as defined in §644.7(b), regardless of age, is eligible to participate in an Educational Opportunity Centers project if he or she satisfies the eligibility requirements in paragraph (a) of this section other than the age requirement in paragraph (a)(2) of this section.

(Authority: 20 U.S.C. 1070a-11 and 1070a-16)

§644.4 What services may a project provide?

An Educational Opportunity Centers project may provide the following services:
(a) Public information campaigns designed to inform the community about opportunities for postsecondary education and training.

(b) Academic advice and assistance in course selection.

(c) Assistance in completing college admission and financial aid applications.

(d) Assistance in preparing for college entrance examinations.

(e) Education or counseling services designed to improve the financial and economic literacy of participants.

(f) Guidance on secondary school reentry or entry to a General Educational Development (GED) program or other alternative education program for secondary school dropouts.

(g) Individualized personal, career, and academic counseling.

(h) Tutorial services.

(i) Career workshops and counseling.

(j) Mentoring programs involving elementary or secondary school teachers, faculty members at institutions of higher education, students, or any combination of these persons.

(k) Programs and activities described in this section that are specially designed for participants who are limited English proficient, participants from groups that are traditionally underrepresented in postsecondary education, participants who are individuals with disabilities, participants who are homeless children and youth, participants who are foster care youth, or other disconnected participants.

(l) Other activities designed to meet the purposes of the Educational Opportunity Centers program stated in §644.1.

(Authority: 20 U.S.C. 1070a-16)


§644.5 How long is a project period?

A project period under the Educational Opportunity Centers program is five years.

(Authority: 20 U.S.C. 1070a-11)

[75 FR 65780, Oct. 26, 2010]
§644.6 What regulations apply?

The following regulations apply to the Educational Opportunity Centers program:

(a) The Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 75 (except for §§75.215 through 75.221), 77, 79, 82, 84, 86, 97, 98, and 99.

(b) The regulations in this part 644.

(Authority: 20 U.S.C. 1070a-11 and 1070a-16)

(c)(1) 2 CFR part 180 (OMB Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement)), as adopted at 2 CFR part 3485; and

(2) 2 CFR part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards), as adopted at 2 CFR part 3474.


§644.7 What definitions apply?

(a) General definitions. The following terms used in this part are defined in 2 CFR part 200, subpart A, or in 34 CFR 77.1:

Applicant          Grant
Application        Grantee
Budget             Private
Budget period      Project
EDGAR              Project period
Equipment          Public
Facilities         Secretary
Fiscal year        Supplies

(b) Other definitions. The following definitions also apply to this part:

Different population means a group of individuals that an eligible entity desires to serve through an application for a grant under the Educational Opportunity Centers program and that—

(i) Is separate and distinct from any other population that the entity has applied for a grant under this chapter to serve; or
(ii) While sharing some of the same needs as another population that the eligible entity has applied for a grant to serve, has distinct needs for specialized services.

*Financial and economic literacy* means knowledge about personal financial decision-making, which may include but is not limited to knowledge about—

(i) Personal and family budget planning;

(ii) Understanding credit building principles to meet long-term and short-term goals (e.g., loan to debt ratio, credit scoring, negative impacts on credit scores);

(iii) Cost planning for postsecondary or postbaccalaureate education (e.g., spending, saving, personal budgeting);

(iv) College cost of attendance (e.g., public vs. private, tuition vs. fees, personal costs);

(v) Financial assistance (e.g., searches, application processes, and differences between private and government loans, assistanceships); and

(vi) Assistance in completing the Free Application for Federal Student Aid (FAFSA).

*Foster care youth* means youth who are in foster care or are aging out of the foster care system.

*HEA* means the Higher Education Act of 1965, as amended.

*Homeless children and youth* means those persons defined in section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a).

*Individual with a disability* means a person who has a disability, as that term is defined in section 12102 of the Americans with Disabilities Act (42 U.S.C. 12101 et seq.).

*Institution of higher education* means an educational institution as defined in sections 101 and 102 of the HEA.

*Low-income individual* means an individual whose family's taxable income did not exceed 150 percent of the poverty level amount in the calendar year preceding the year in which the individual initially participated in the project. The poverty level amount is determined by using criteria of poverty established by the Bureau of the Census of the U.S. Department of Commerce.

*Participant* means an individual who—

(i) Is determined to be eligible to participate in the project under §644.3; and

(ii) Receives project services.

*Postsecondary education* means education beyond the secondary school level.
Potential first-generation college student means—

(i) An individual neither of whose parents received a baccalaureate degree; or

(ii) An individual who regularly resided with and received support from only one parent and whose supporting parent did not receive a baccalaureate degree.

Secondary school means a school that provides secondary education as determined under State law, except that it does not include education beyond grade 12.

Target area means a geographic area served by an Educational Opportunity Centers project.

Veteran means a person who—

(i) Served on active duty as a member of the Armed Forces of the United States for a period of more than 180 days and was discharged or released under conditions other than dishonorable;

(ii) Served on active duty as a member of the Armed Forces of the United States and was discharged or released because of a service connected disability;

(iii) Was a member of a reserve component of the Armed Forces of the United States and was called to active duty for a period of more than 30 days; or

(iv) Was a member of a reserve component of the Armed Forces of the United States who served on active duty in support of a contingency operation (as that term is defined in section 101(a)(13) of title 10, United States Code) on or after September 11, 2001.

(Authority: 20 U.S.C. 1070a-11, 1070a-16, and 1141)


Subpart B—How Does One Apply for an Award?

§644.10 How many applications may an eligible applicant submit?

(a) An applicant may submit more than one application for Educational Opportunity Centers grants as long as each application describes a project that serves a different target area or another designated different population.

(b) For each grant competition, the Secretary designates, in the FEDERAL REGISTER notice inviting applications and other published application materials for the competition, the different populations for which an eligible entity may submit a separate application.
§644.11 What assurances must an applicant submit?

An applicant must submit, as part of its application, assurances that—

(a) At least two-thirds of the individuals it serves under its proposed Educational Opportunity Centers project will be low-income individuals who are potential first-generation college students;

(b) The project will collaborate with other Federal TRIO projects, GEAR UP projects, or programs serving similar populations that are serving the same target schools or target area in order to minimize the duplication of services and promote collaborations so that more students can be served.

(c) The project will be located in a setting or settings accessible to the individuals proposed to be served by the project; and

(d) If the applicant is an institution of higher education, it will not use the project as a part of its recruitment program.

Subpart C—How Does the Secretary Make a Grant?

§644.20 How does the Secretary decide which new grants to make?

(a) The Secretary evaluates an application for a new grant as follows:

(1)(i) The Secretary evaluates the application on the basis of the selection criteria in §644.21.

(ii) The maximum score for all the criteria in §644.21 is 100 points. The maximum score for each criterion is indicated in parentheses with the criterion.

(2)(i) For an application for a new grant to continue to serve substantially the same populations and campuses that the applicant is serving under an expiring project, the Secretary evaluates the applicant's prior experience of high quality service delivery under the expiring project on the basis of the outcome criteria in §644.22.
(ii) The maximum total score for all the criteria in §644.22 is 15 points. The maximum score for each criterion is indicated in parentheses with the criterion.

(iii) The Secretary evaluates the PE of an applicant for each of the three project years that the Secretary designates in the FEDERAL REGISTER notice inviting applications and the other published application materials for the competition.

(iv) An applicant may earn up to 15 PE points for each of the designated project years for which annual performance report data are available.

(v) The final PE score is the average of the scores for the three project years assessed.

(b) The Secretary makes new grants in rank order on the basis of the applications' total scores under paragraph (a) of this section.

(c) If the total scores of two or more applications are the same and there are insufficient funds for these applications after the approval of higher-ranked applications, the Secretary uses the remaining funds to serve geographic areas and eligible populations that have been underserved by the Educational Opportunity Centers program.

(d) The Secretary does not make a new grant to an applicant if the applicant's prior project involved the fraudulent use of program funds.

(Authority: 20 U.S.C. 1070a-11, 1070a-16, and 1144a(a))


§644.21 What selection criteria does the Secretary use?

The Secretary uses the following criteria to evaluate an application for a new grant:

(a) **Need for the project** (24 points). The Secretary evaluates the need for an Educational Opportunity Centers project in the proposed target area on the basis of the extent to which the application contains clear evidence of—

1. A high number or percentage, or both, of low-income families residing in the target area;

2. A high number or percentage, or both, of individuals residing in the target area with education completion levels below the baccalaureate level;

3. A high need on the part of residents of the target area for further education and training from programs of postsecondary education in order to meet changing employment trends; and

4. Other indicators of need for an Educational Opportunity Centers project, including the presence of unaddressed educational or socioeconomic problems of adult residents in the target area.
(b) Objectives (8 points). The Secretary evaluates the quality of the applicant's objectives and proposed targets (percentages) in the following areas on the basis of the extent to which they are both ambitious, as related to the need data provided under paragraph (a) of this section, and attainable, given the project's plan of operation, budget, and other resources:

1. (2 points) Secondary school diploma or equivalent.
2. (3 points) Postsecondary enrollment.
3. (1.5 points) Financial aid applications.
4. (1.5 points) College admission applications.

(c) Plan of operation (30 points). The Secretary evaluates the quality of the applicant's plan of operation on the basis of the following:

1. (4 points) The plan to inform the residents, schools, and community organizations in the target area of the goals, objectives, and services of the project and the eligibility requirements for participation in the project;
2. (4 points) The plan to identify and select eligible participants and ensure their participation without regard to race, color, national origin, gender, or disability;
3. (2 points) The plan to assess each participant's need for services provided by the project;
4. (12 points) The plan to provide services that meet participants' needs and achieve the objectives of the project; and
5. (8 points) The management plan to ensure the proper and efficient administration of the project including, but not limited to, the project's organizational structure, the time committed to the project by the project director and other personnel, and, where appropriate, its coordination with other projects for disadvantaged students.

(d) Applicant and community support (16 points). The Secretary evaluates the applicant and community support for the proposed project on the basis of the extent to which the applicant has made provision for resources to supplement the grant and enhance the project's services, including—

1. (8 points) Facilities, equipment, supplies, personnel, and other resources committed by the applicant; and
2. (8 points) Resources secured through written commitments from schools, community organizations, and others.

(e) Quality of personnel (9 points). (1) The Secretary evaluates the quality of the personnel the applicant plans to use in the project on the basis of the following:
(i) The qualifications required of the project director.

(ii) The qualifications required of each of the other personnel to be used in the project.

(iii) The plan to employ personnel who have succeeded in overcoming the disadvantages or circumstances like those of the population of the target area.

(2) In evaluating the qualifications of a person, the Secretary considers his or her experience and training in fields related to the objectives of the project.

(f) **Budget** (5 points). The Secretary evaluates the extent to which the project budget is reasonable, cost-effective, and adequate to support the project.

(g) **Evaluation plan** (8 points). The Secretary evaluates the quality of the evaluation plan for the project on the basis of the extent to which the applicant's methods of evaluation—

1. Are appropriate to the project's objectives;

2. Provide for the applicant to determine, using specific and quantifiable measures, the success of the project in—

   (i) Making progress toward achieving its objectives (a formative evaluation); and

   (ii) Achieving its objectives at the end of the project period (a summative evaluation); and

3. Provide for the disclosure of unanticipated project outcomes, using quantifiable measures if appropriate.

(Approved by the Office of Management and Budget under control number 1840-NEW3)

(Authority: 20 U.S.C. 1070a-16)


**§644.22 How does the Secretary evaluate prior experience?**

(a) In the case of an application described in §644.20(a)(2)(i), the Secretary—

1. Evaluates the applicant's performance under its expiring Educational Opportunity Centers project;

2. Uses the approved project objectives for the applicant's expiring Educational Opportunity Centers grant and the information the applicant submitted in its annual performance reports (APRs) to determine the number of PE points; and
(3) May adjust a calculated PE score or decide not to award PE points if other information such as audit reports, site visit reports, and project evaluation reports indicates the APR data used to calculate PE points are incorrect.

(b) The Secretary does not award PE points for a given year to an applicant that does not serve at least 90 percent of the approved number of participants. For purposes of this section, the approved number of participants is the total number of participants the project would serve as agreed upon by the grantee and the Secretary.

(c) The Secretary does not award PE points for the criterion specified in paragraph (d)(1) of this section (Number of participants) if the applicant did not serve at least the approved number of participants.

(d) For purposes of the PE evaluation of grants awarded after January 1, 2009, the Secretary evaluates the applicant's PE on the basis of the following outcome criteria:

1. (3 points) Number of participants. Whether the applicant provided services to no less than the approved number of participants.

2. (3 points) Secondary school diploma. Whether the applicant met or exceeded its approved objective with regard to participants served during the project year who do not have a secondary school diploma or its equivalent who receive a secondary school diploma or its equivalent within the time period specified in the approved objective.

3. (5 points) Postsecondary enrollment. Whether the applicant met or exceeded its approved objective with regard to the secondary school graduates served during the project year who enroll in programs of postsecondary education within the time period specified in the approved objective.

4. (2 points) Financial aid applications. Whether the applicant met or exceeded its objective regarding participants applying for financial aid.

5. (2 points) College admission applications. Whether the applicant met or exceeded its objective regarding participants applying for college admission.

(Approved by the Office of Management and Budget under control number 1840-NEW8)

(Authority: 20 U.S.C. 1070a-16)

[75 FR 65781, Oct. 26, 2010]

§644.23 How does the Secretary set the amount of a grant?

(a) The Secretary sets the amount of a grant on the basis of—

1. 34 CFR 75.232 and 75.233, for new grants; and
(2) 34 CFR 75.253, for the second and subsequent years of a project period.

(b) If the circumstances described in section 402A(b)(3) of the HEA exist, the Secretary uses the available funds to set the amount of the grant at the lesser of—

(1) $200,000; or

(2) The amount requested by the applicant.

(Authority: 20 U.S.C. 1070a-11)


§644.24 What is the review process for unsuccessful applicants?

(a) Technical or administrative error for applications not reviewed. (1) An applicant whose grant application was not evaluated during the competition may request that the Secretary review the application if—

(i) The applicant has met all of the application submission requirements included in the FEDERAL REGISTER notice inviting applications and the other published application materials for the competition; and

(ii) The applicant provides evidence demonstrating that the Department or an agent of the Department made a technical or administrative error in the processing of the submitted application.

(2) A technical or administrative error in the processing of an application includes—

(i) A problem with the system for the electronic submission of applications that was not addressed in accordance with the procedures included in the FEDERAL REGISTER notice inviting applications for the competition;

(ii) An error in determining an applicant's eligibility for funding consideration, which may include, but is not limited to—

(A) An incorrect conclusion that the application was submitted by an ineligible applicant;

(B) An incorrect conclusion that the application exceeded the published page limit;

(C) An incorrect conclusion that the applicant requested funding greater than the published maximum award; or
(D) An incorrect conclusion that the application was missing critical sections of the application; and

(iii) Any other mishandling of the application that resulted in an otherwise eligible application not being reviewed during the competition.

(3)(i) If the Secretary determines that the Department or the Department's agent made a technical or administrative error, the Secretary has the application evaluated and scored.

(ii) If the total score assigned the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c) of this section.

(b) Administrative or scoring error for applications that were reviewed. (1) An applicant that was not selected for funding during a competition may request that the Secretary conduct a second review of the application if—

(i) The applicant provides evidence demonstrating that the Department, an agent of the Department, or a peer reviewer made an administrative or scoring error in the review of its application; and

(ii) The final score assigned to the application is within the funding band described in paragraph (d) of this section.

(2) An administrative error relates to either the PE points or the scores assigned to the application by the peer reviewers.

(i) For PE points, an administrative error includes mathematical errors made by the Department or the Department's agent in the calculation of the PE points or a failure to correctly add the earned PE points to the peer reviewer score.

(ii) For the peer review score, an administrative error is applying the wrong peer reviewer scores to an application.

(3)(i) A scoring error relates only to the peer review process and includes errors caused by a reviewer who, in assigning points—

(A) Uses criteria not required by the applicable law or program regulations, the FEDERAL REGISTER notice inviting applications, the other published application materials for the competition, or guidance provided to the peer reviewers by the Secretary; or

(B) Does not consider relevant information included in the appropriate section of the application.

(ii) The term “scoring error” does not include—
(A) A peer reviewer's appropriate use of his or her professional judgment in evaluating and scoring an application;

(B) Any situation in which the applicant did not include information needed to evaluate its response to a specific selection criterion in the appropriate section of the application as stipulated in the Federal Register notice inviting applications or the other published application materials for the competition; or

(C) Any error by the applicant.

(c) Procedures for the second review. (1) To ensure the timely awarding of grants under the competition, the Secretary sets aside a percentage of the funds allotted for the competition to be awarded after the second review is completed.

(2) After the competition, the Secretary makes new awards in rank order as described in §644.20 based on the available funds for the competition minus the funds set aside for the second review.

(3) After the Secretary issues a notification of grant award to successful applicants, the Secretary notifies each unsuccessful applicant in writing as to the status of its application and the funding band for the second review and provides copies of the peer reviewers' evaluations of the applicant's application and the applicant's PE score, if applicable.

(4) An applicant that was not selected for funding following the competition as described in paragraph (c)(2) of this section and whose application received a score within the funding band as described in paragraph (d) of this section, may request a second review if the applicant demonstrates that the Department, the Department's agent, or a peer reviewer made an administrative or scoring error as provided in paragraph (b) of this section.

(5) An applicant whose application was not funded after the first review as described in paragraph (c)(2) of this section and whose application received a score within the funding band as described in paragraph (d) of this section has at least 15 calendar days after receiving notification that its application was not funded in which to submit a written request for a second review in accordance with the instructions and due date provided in the Secretary's written notification.

(6) An applicant's written request for a second review must be received by the Department or submitted electronically to the designated e-mail or Web address by the due date and time established by the Secretary.

(7) If the Secretary determines that the Department or the Department's agent made an administrative error that relates to the PE points awarded, as described in paragraph (b)(2)(i) of this section, the Secretary adjusts the applicant's PE score to reflect the correct number of PE points. If the adjusted score assigned to the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c)(9) of this section.
(8) If the Secretary determines that the Department, the Department's agent or the peer reviewer made an administrative error that relates to the peer reviewers' score(s), as described in paragraph (b)(2)(ii) of this section, the Secretary adjusts the applicant's peer reviewers' score(s) to correct the error. If the adjusted score assigned to the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c)(9) of this section.

(9) If the Secretary determines that a peer reviewer made a scoring error, as described in paragraph (b)(3) of this section, the Secretary convenes a second panel of peer reviewers in accordance with the requirements in section 402A(c)(8)(C)(iv)(III) of the HEA.

(10) The average of the peer reviewers' scores from the second peer review are used in the second ranking of applications. The average score obtained from the second peer review panel is the final peer reviewer score for the application and will be used even if the second review results in a lower score for the application than that obtained in the initial review.

(11) For applications in the funding band, the Secretary funds these applications in rank order based on adjusted scores and the available funds that have been set aside for the second review of applications.

(d) Process for establishing a funding band. (1) For each competition, the Secretary establishes a funding band for the second review of applications.

(2) The Secretary establishes the funding band for each competition based on the amount of funds the Secretary has set aside for the second review of applications.

(3) The funding band is composed of those applications—

(i) With a rank-order score before the second review that is below the lowest score of applications funded after the first review; and

(ii) That would be funded if the Secretary had 150 percent of the funds that were set aside for the second review of applications for the competition.

(e) Final decision. (1) The Secretary's determination of whether the applicant has met the requirements for a second review and the Secretary's decision on re-scoring of an application are final and not subject to further appeal or challenge.

(2) An application that scored below the established funding band for the competition is not eligible for a second review.

(Approved by the Office of Management and Budget under control number 1840—NEW3)

(Authority: 20 U.S.C. 1070a-11)
Subpart D—What Conditions Must Be Met by a Grantee?

§644.30 What are allowable costs?

The cost principles that apply to the Educational Opportunity Centers program are in 2 CFR part 200, subpart E. Allowable costs include the following if they are reasonably related to the objectives of the project:

(a) Transportation, meals, and, with specific prior approval of the Secretary, lodging for participants and project staff for—

(1) Visits to postsecondary educational institutions;

(2) Participation in “College Day” activities; and

(3) Field trips for participants to observe and meet with persons who are employed in various career fields and can act as role models for participants.

(b) Purchase of testing materials and test preparation programs for participants.

(c) Fees required for admission applications for postsecondary education, college entrance examinations, or alternative education examinations if—

(1) A waiver is unavailable; and

(2) The fee is paid by the grantee to a third party on behalf of a participant.

(d) In-service training of project staff.

(e) Rental of space if—

(1) Space is not available at the site of the grantee; and

(2) The rented space is not owned by the grantee.

(f) Purchase, lease, or rental of computer hardware, software, and other equipment, service agreements for such equipment, and supplies for participant development, project administration, or project recordkeeping.

(Authority: 20 U.S.C. 1070a-11 and 1070a-16)

§644.31 What are unallowable costs?

Costs that are unallowable under the Educational Opportunity Centers program include, but are not limited to, the following:

(a) Tuition, fees, stipends, and other forms of direct financial support for participants.

(b) Research not directly related to the evaluation or improvement of the project.

(c) Construction, renovation, and remodeling of any facilities.

(Authority: 20 U.S.C. 1070a-11 and 1070a-16)

§644.32 What other requirements must a grantee meet?

(a) Eligibility of participants. (1) A grantee shall determine the eligibility of each participant in the project at the time that the individual is selected to participate.

(2) A grantee shall determine the status of a low-income individual on the basis of the documentation described in section 402A(e) of the HEA.

(b) Number of Participants. For each year of the project period, a grantee must serve at least the number of participants that the Secretary identifies in the FEDERAL REGISTER notice inviting applications for a competition. Through this notice, the Secretary also provides the minimum and maximum grant award amounts for the competition.

(c) Recordkeeping. For each participant, a grantee must maintain a record of—

(1) The basis for the grantee's determination that the participant is eligible to participate in the project under §644.3;

(2) The services that are provided to the participant;

(3) The specific educational benefits received by the participant; and

(4) To the extent practicable, any services the participant receives during the project year from another Federal TRIO program or another federally funded program that serves populations similar to those served under the EOC program.

(d) Project director. (1) A grantee must employ a full-time project director unless—

(i) The director is also administering one or two additional programs for disadvantaged students operated by the sponsoring institution or agency; or

(ii) The Secretary grants a waiver of this requirement.
(2) The grantee must give the project director sufficient authority to administer the project effectively.

(3) The Secretary waives the requirements in paragraph (d)(1) of this section if the applicant demonstrates that the project director will be able to effectively administer more than three programs and that this arrangement would promote effective coordination between the program and other Federal TRIO programs (sections 402B through 402F of the HEA) and similar programs funded through other sources.

(Approved by the Office of Management and Budget under control number 1840—NEW8)

(Authority: 20 U.S.C. 1070a-11 and 1070a-16).

PART 643—TALENT SEARCH

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Subpart A—General

§643.1 What is the Talent Search program?

The Talent Search program provides grants for projects designed to—

(a) Identify qualified youths with potential for education at the postsecondary level and encourage them to complete secondary school and undertake a program of postsecondary education;

(b) Publicize the availability of, and facilitate the application for, student financial assistance for persons who seek to pursue postsecondary education; and

(c) Encourage persons who have not completed education programs at the secondary or postsecondary level to enter or reenter and complete these programs.

(Authority: 20 U.S.C. 1070a-12)


§643.2 Who is eligible for a grant?

The following entities are eligible for a grant to carry out a Talent Search project:

(a) An institution of higher education.

(b) A public or private agency or organization, including a community-based organization with experience in serving disadvantaged youth.

(c) A secondary school.

(d) A combination of the types of institutions, agencies, and organizations described in paragraphs (a), (b), and (c) of this section.

(Authority: 20 U.S.C. 1070a-11)
§643.3 Who is eligible to participate in a project?

(a) An individual is eligible to participate in a Talent Search project if the individual meets all the following requirements:

(1)(i) Is a citizen or national of the United States;

(ii) Is a permanent resident of the United States;

(iii) Is in the United States for other than a temporary purpose and provides evidence from the Immigration and Naturalization Service of his or her intent to become a permanent resident;

(iv) Is a permanent resident of Guam, the Northern Mariana Islands, or the Trust Territory of the Pacific Islands (Palau); or

(v) Is a resident of the Freely Associated States—the Federated States of Micronesia or the Republic of the Marshall Islands.

(2)(i) Has completed five years of elementary education or is at least 11 years of age but not more than 27 years of age.

(ii) However, an individual who is more than 27 years of age may participate in a Talent Search project if the individual cannot be appropriately served by an Educational Opportunity Center project under 34 CFR part 644 and if the individual's participation would not dilute the Talent Search project's services to individuals described in paragraph (a)(2)(i) of this section.

(3)(i) Is enrolled in or has dropped out of any grade from six through 12, or has graduated from secondary school, ; or

(ii) Has undertaken, but is not presently enrolled in, a program of postsecondary education,

(b) A veteran as defined in §643.6(b), regardless of age, is eligible to participate in a Talent Search project if he or she satisfies the eligibility requirements in paragraph (a) of this section other than the age requirement in paragraph (a)(2).

(Authority: 20 U.S.C. 1070a-11 and 1070a-12)

§643.4 What services does a project provide?

(a) A Talent Search project must provide the following services:
(1) Connections for participants to high quality academic tutoring services to enable the participants to complete secondary or postsecondary courses.

(2) Advice and assistance in secondary school course selection and, if applicable, initial postsecondary course selection.

(3) Assistance in preparing for college entrance examinations and completing college admission applications.

(4)(i) Information on the full range of Federal student financial aid programs and benefits (including Federal Pell Grant awards and loan forgiveness) and on resources for locating public and private scholarships; and

(ii) Assistance in completing financial aid applications, including the Free Application for Federal Student Aid (FAFSA).

(5) Guidance on and assistance in—

(i) Secondary school reentry;

(ii) Alternative education programs for secondary school dropouts that lead to the receipt of a regular secondary school diploma;

(iii) Entry into general educational development (GED) programs; or

(iv) Entry into postsecondary education.

(6) Connections for participants to education or counseling services designed to improve the financial and economic literacy of the participants or the participants' parents, including financial planning for postsecondary education.

(b) A Talent Search project may provide services such as the following:

(1) Academic tutoring, which may include instruction in reading, writing, study skills, mathematics, science, and other subjects.

(2) Personal and career counseling or activities.

(3) Information and activities designed to acquaint youth with the range of career options available to the youth.

(4) Exposure to the campuses of institutions of higher education, as well as to cultural events, academic programs, and other sites or activities not usually available to disadvantaged youth.

(5) Workshops and counseling for families of participants served.
(6) Mentoring programs involving elementary or secondary school teachers or counselors, faculty members at institutions of higher education, students, or any combination of these persons.

(7) Programs and activities as described in this section that are specially designed for participants who are limited English proficient, from groups that are traditionally underrepresented in postsecondary education, individuals with disabilities, homeless children and youths, foster care youth, or other disconnected participants.

(8) Other activities designed to meet the purposes of the Talent Search Program in §643.1.

(Authority: 20 U.S.C. 1070a-12)

[75 FR 65775, Oct. 26, 2010]

§643.5 How long is a project period?

A project period under the Talent Search program is five years.

(Authority: 20 U.S.C. 1070a-11)

[75 FR 65775, Oct. 26, 2010]

§643.6 What regulations apply?

The following regulations apply to the Talent Search program:

(a) The Education Department General Administrative Regulations (EDGAR) in 34 CFR parts 75 (except for §§75.215 through 75.221), 77, 79, 82, 84, 86, 97, 98, and 99.

(b) The regulations in this part 643.

(c)(1) 2 CFR part 180 (OMB Guidelines to Agencies on Debarment and Suspension (Nonprocurement)), as adopted at 2 CFR part 3485; and

(2) 2 CFR part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards), as adopted at 2 CFR part 3474.

(Authority: 20 U.S.C. 1070a-11 and 1070a-12)


§643.7 What definitions apply?
(a) *General definitions.* The following terms used in this part are defined in 2 CFR part 200, subpart A, or in 34 CFR 77.1:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Applicant</td>
<td>Grant</td>
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<td>Application</td>
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<td>Budget</td>
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<td>EDGAR</td>
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<td>Facilities</td>
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(b) *Other definitions.* The following definitions also apply to this part:

*Different population* means a group of individuals that an eligible entity desires to serve through an application for a grant under the Talent Search program and that—

1. Is separate and distinct from any other population that the entity has applied for a grant to serve; or

2. While sharing some of the same needs as another population that the eligible entity has applied for a grant to serve, has distinct needs for specialized services.

*Financial and economic literacy* means knowledge about personal financial decision-making, which may include but is not limited to knowledge about—

1. Personal and family budget planning;

2. Understanding credit building principles to meet long-term and short-term goals (e.g., loan to debt ratio, credit scoring, negative impacts on credit scores);

3. Cost planning for postsecondary or postbaccalaureate education (e.g., spending, saving, personal budgeting);

4. College cost of attendance (e.g., public vs. private, tuition vs. fees, personal costs);

5. Financial assistance (e.g., searches, application processes, and differences between private and government loans, assistanceships); and

6. Assistance in completing the Free Application for Federal Student Aid (FAFSA).

*Foster care youth* means youth who are in foster care or are aging out of the foster care system.

*HEA* means the Higher Education Act of 1965, as amended.
Homeless children and youth means persons defined in section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a).

Individual with a disability means a person who has a disability, as that term is defined in section 12102 of the Americans with Disabilities Act (42 U.S.C. 12101 et seq.).

Institution of higher education means an educational institution as defined in sections 101 and 102 of the HEA.

Low-income individual means an individual whose family's taxable income did not exceed 150 percent of the poverty level amount in the calendar year preceding the year in which the individual initially participated in the project. The poverty level amount is determined by using criteria of poverty established by the Bureau of the Census of the U.S. Department of Commerce.

Participant means an individual who—

(1) Is determined to be eligible to participate in the project under §643.3; and

(2) Receives project services designed for his or her age or grade level.

Postsecondary education means education beyond the secondary school level.

Potential first-generation college student means—

(1) An individual neither of whose natural or adoptive parents received a baccalaureate degree;

(2) An individual who, prior to the age of 18, regularly resided with and received support from only one parent and whose supporting parent did not receive a baccalaureate degree; or

(3) An individual who, prior to the age of 18, did not regularly reside with or receive support from a natural or an adoptive parent.

Regular secondary school diploma means a level attained by individuals who meet or exceed the coursework and performance standards for high school completion established by the individual's State.

Rigorous secondary school program of study means a program of study that is—

(1) Established by a state educational agency (SEA) or local educational agency (LEA) and recognized as a rigorous secondary school program of study by the Secretary through the process described in 34 CFR 691.16(a) through 691.16(c) for the Academic Competitiveness Grant (ACG) Program;

(2) An advanced or honors secondary school program established by States and in existence for the 2004-2005 school year or later school years;
(3) Any secondary school program in which a student successfully completes at a minimum the following courses:

(i) Four years of English.

(ii) Three years of mathematics, including algebra I and a higher-level class such as algebra II, geometry, or data analysis and statistics.

(iii) Three years of science, including one year each of at least two of the following courses: Biology, chemistry, and physics.

(iv) Three years of social studies.

(v) One year of a language other than English;

(4) A secondary school program identified by a State-level partnership that is recognized by the State Scholars Initiative of the Western Interstate Commission for Higher Education (WICHE), Boulder, Colorado;

(5) Any secondary school program for a student who completes at least two courses from an International Baccalaureate Diploma Program sponsored by the International Baccalaureate Organization, Geneva, Switzerland, and receives a score of a “4” or higher on the examinations for at least two of those courses; or

(6) Any secondary school program for a student who completes at least two Advanced Placement courses and receives a score of “3” or higher on the College Board's Advanced Placement Program Exams for at least two of those courses.

Secondary school means a school that provides secondary education as determined under State law, except that it does not include education beyond grade 12.

Target area means a geographic area served by a Talent Search project.

Target school means a school designated by the applicant as a focus of project services.

Veteran means a person who—

(1) Served on active duty as a member of the Armed Forces of the United States for a period of more than 180 days and was discharged or released under conditions other than dishonorable;

(2) Served on active duty as a member of the Armed Forces of the United States and was discharged or released because of a service connected disability;

(3) Was a member of a reserve component of the Armed Forces of the United States and was called to active duty for a period of more than 30 days; or
(4) Was a member of a reserve component of the Armed Forces of the United States who served on active duty in support of a contingency operation (as that term is defined in section 101(a)(13) of title 10, United States Code) on or after September 11, 2001.

(Authority: 20 U.S.C. 1070a-11, 1070a-12 and 1141)


Subpart B—How Does One Apply for an Award?

§643.10  How many applications may an eligible applicant submit?

(a) An applicant may submit more than one application for Talent Search grants as long as each application describes a project that serves a different target area or target schools, or another designated different population.

(b) For each grant competition, the Secretary designates, in the FEDERAL REGISTER notice inviting applications and the other published application materials for the competition, the different populations for which an eligible entity may submit a separate application.

(Authority: 20 U.S.C. 1070a-12; 1221e-3)

[75 FR 65776, Oct. 26, 2010]

§643.11  What assurance must an applicant submit?

An applicant must submit, as part of its application, assurances that—

(a) At least two-thirds of the individuals it serves under its proposed Talent Search project will be low-income individuals who are potential first-generation college students;

(b) The project will collaborate with other Federal TRIO projects, GEAR UP projects, or programs serving similar populations that are serving the same target schools or target area in order to minimize the duplication of services and promote collaborations so that more students can be served.

(c) The project will be located in a setting or settings accessible to the individuals proposed to be served by the project; and

(d) If the applicant is an institution of higher education, it will not use the project as a part of its recruitment program.
Subpart C—How Does the Secretary Make a Grant?

§643.20 How does the Secretary decide which new grants to make?

(a) The Secretary evaluates an application for a new grant as follows:

(1)(i) The Secretary evaluates the application on the basis of the selection criteria in §643.21.

(ii) The maximum score for all the criteria in §643.21 is 100 points. The maximum score for each criterion is indicated in parentheses with the criterion.

(2)(i) For an application for a new grant to continue to serve substantially the same populations and campuses that the applicant is serving under an expiring project, the Secretary evaluates the applicant's prior experience of high quality service delivery under the expiring project on the basis of the outcome criteria in §643.22.

(ii) The maximum total score for all the criteria in §643.22 is 15 points. The maximum score for each criterion is indicated in parentheses with the criterion.

(iii) The Secretary evaluates the PE of an applicant for each of the three project years that the Secretary designates in the FEDERAL REGISTER notice inviting applications and the other published application materials for the competition.

(iv) An applicant may earn up to 15 PE points for each of the designated project years for which annual performance report data are available.

(v) The final PE score is the average of the scores for the three project years assessed.

(b) The Secretary makes new grants in rank order on the basis of the applications' total scores under paragraphs (a)(1) and (a)(2) of this section.

(c) If the total scores of two or more applications are the same and there are insufficient funds for these applications after the approval of higher-ranked applications, the Secretary uses the remaining funds to serve geographic areas and eligible populations that have been underserved by the Talent Search program.

(d) The Secretary does not make a new grant to an applicant if the applicant's prior project involved the fraudulent use of program funds.

(Authority: 20 U.S.C. 1070a-11, 1070a-12, and 1144a(a))
§643.21 What selection criteria does the Secretary use?

The Secretary uses the following criteria to evaluate an application for a new grant:

(a) Need for the project (24 points). The Secretary evaluates the need for a Talent Search project in the proposed target area on the basis of the extent to which the application contains clear evidence of the following:

(1) (4 points) A high number or high percentage of the following—

(i) Low-income families residing in the target area; or

(ii) Students attending the target schools who are eligible for free or reduced priced lunch as described in sections 9(b)(1) and 17(c)(4) of the Richard B. Russell National School Lunch Act.

(2) (2 points) Low rates of high school persistence among individuals in the target schools as evidenced by the annual student persistence rates in the proposed target schools for the most recent year for which data are available.

(3) (4 points) Low rates of students in the target school or schools who graduate high school with a regular secondary school diploma in the standard number of years for the most recent year for which data are available.

(4) (6 points) Low postsecondary enrollment and completion rates among individuals in the target area and schools as evidenced by—

(i) Low rates of enrollment in programs of postsecondary education by graduates of the target schools in the most recent year for which data are available; and

(ii) A high number or high percentage of individuals residing in the target area with education completion levels below the baccalaureate degree level.

(5) (2 points) The extent to which the target secondary schools do not offer their students the courses or academic support to complete a rigorous secondary school program of study or have low participation or low success by low-income or first generation students in such courses.

(6) (6 points) Other indicators of need for a TS project, including low academic achievement and low standardized test scores of students enrolled in the target schools, a high ratio of students to school counselors in the target schools, and the presence of unaddressed academic or socio-economic problems of eligible individuals, including foster care youth and homeless children and youth in the target schools or the target area.

(b) Objectives (8 points). The Secretary evaluates the quality of the applicant's objectives and proposed targets (percentages) in the following areas on the basis of the extent to which they are
both ambitious, as related to the need data provided under paragraph (a) of this section, and attainable, given the project's plan of operation, budget, and other resources:

(1) (2 points) Secondary school persistence.

(2) (2 points) Secondary school graduation (regular secondary school diploma).

(3) (1 point) Secondary school graduation (rigorous secondary school program of study).

(4) (2 points) Postsecondary education enrollment.

(5) (1 point) Postsecondary degree attainment.

(c) Plan of operation (30 points). The Secretary evaluates the quality of the applicant's plan of operation on the basis of the following:

(1) (3 points) The plan to inform the residents, schools, and community organizations in the target area of the purpose, objectives, and services of the project and the eligibility requirements for participation in the project.

(2) (3 points) The plan to identify and select eligible project participants.

(3) (10 points) The plan for providing the services delineated in §643.4 as appropriate based on the project's assessment of each participant's need for services.

(4) (6 points) The plan to work in a coordinated, collaborative, and cost-effective manner as part of an overarching college access strategy with the target schools or school system and other programs for disadvantaged students to provide participants with access to and assistance in completing a rigorous secondary school program of study.

(5) (6 points) The plan, including timelines, personnel, and other resources, to ensure the proper and efficient administration of the project, including the project's organizational structure; the time commitment of key project staff; and financial, personnel, and records management.

(6) (2 points) The plan to follow former participants as they enter, continue in, and complete postsecondary education.

(d) Applicant and community support (16 points). The Secretary evaluates the applicant and community support for the proposed project on the basis of the extent to which the applicant has made provision for resources to supplement the grant and enhance the project's services, including—

(1) (8 points) Facilities, equipment, supplies, personnel, and other resources committed by the applicant; and

(2) (8 points) Resources secured through written commitments from community partners.
(i) An applicant that is an institution of higher education must include in its application commitments from the target schools and community organizations;

(ii) An applicant that is a secondary school must include in its commitments from institutions of higher education, community organizations, and, as appropriate, other secondary schools and the school district; and

(iii) An applicant that is a community organization must include in its application commitments from the target schools and institutions of higher education.

c) Quality of personnel (9 points). (1) The Secretary evaluates the quality of the personnel the applicant plans to use in the project on the basis of the following:

(i) The qualifications required of the project director.

(ii) The qualifications required of each of the other personnel to be used in the project.

(iii) The plan to employ personnel who have succeeded in overcoming the disadvantages of circumstances like those of the population of the target area.

(2) In evaluating the qualifications of a person, the Secretary considers his or her experience and training in fields related to the objectives of the project.

f) Budget (5 points). The Secretary evaluates the extent to which the project budget is reasonable, cost-effective, and adequate to support the project.

g) Evaluation plan (8 points). The Secretary evaluates the quality of the evaluation plan for the project on the basis of the extent to which the applicant's methods of evaluation—

(1) Are appropriate to the project's objectives;

(2) Provide for the applicant to determine, using specific and quantifiable measures, the success of the project in—

(i) Making progress toward achieving its objectives (a formative evaluation); and

(ii) Achieving its objectives at the end of the project period (a summative evaluation); and

(3) Provide for the disclosure of unanticipated project outcomes, using quantifiable measures if appropriate.

(Approved by the Office of Management and Budget under control number 1840-0065)

(Authority: 20 U.S.C. 1070a-12)

§643.22 How does the Secretary evaluate prior experience?

(a) In the case of an application described in §643.20(a)(2)(i), the Secretary—

(1) Evaluates the applicant's performance under its expiring Talent Search project;

(2) Uses the approved project objectives for the applicant's expiring Talent Search grant and the information the applicant submitted in its annual performance reports (APRs) to determine the number of PE points; and

(3) May adjust a calculated PE score or decide not to award PE points if other information such as audit reports, site visit reports, and project evaluation reports indicates the APR data used to calculate PE are incorrect.

(b) The Secretary does not award PE points for a given year to an applicant that does not serve at least 90 percent of the approved number of participants. For purposes of this section, the approved number of participants is the total number of participants the project would serve as agreed upon by the grantee and the Secretary.

(c) The Secretary does not award any PE points for the criterion specified in paragraph (d)(1) of this section (Number of participants) if the applicant did not serve at least the approved number of participants.

(d) For purposes of the evaluation of grants awarded after January 1, 2009, the Secretary evaluates the applicant's PE on the basis of the following outcome criteria:

1. (3 points) Number of participants. Whether the applicant provided services to no less than the approved number of participants.

2. (3 points) Secondary school persistence. Whether the applicant met or exceeded its objective regarding the continued secondary school enrollment of participants.

3. (3 points) Secondary school graduation (regular secondary school diploma). Whether the applicant met or exceeded its objective regarding the graduation of participants served during the project year from secondary school with a regular secondary school diploma in the standard number of years.

4. (1.5 points) Secondary school graduation (rigorous secondary school program of study). Whether the applicant met or exceeded its objective regarding the graduation of participants served during the project year who completed a rigorous secondary school program of study.

5. (3 points) Postsecondary enrollment. Whether the applicant met or exceeded its objective regarding the participants expected to graduate from high school in the school year who enrolled in an institution of higher education within the time period specified in the approved objective.
(6) (1.5 points) Postsecondary completion. Whether the applicant met or exceeded its objective regarding project participants who enrolled in and completed a program of postsecondary education within the number of years specified in the approved objective. The applicant may determine success in meeting the objective by using a randomly selected sample of participants in accordance with the parameters established by the Secretary in the FEDERAL REGISTER notice inviting applications or other published application materials for the competition.

(Approved by the Office of Management and Budget under control number 1840—NEW7)

(Authority: 20 U.S.C. 1070a-12)

[75 FR 65777, Oct. 26, 2010]

§643.23 How does the Secretary set the amount of a grant?

(a) The Secretary sets the amount of a grant on the basis of—

(1) 34 CFR 75.232 and 75.233, for new grants; and

(2) 34 CFR 75.253, for the second and subsequent years of a project period.

(b) If the circumstances described in section 402A(b)(3) of the HEA exist, the Secretary uses the available funds to set the amount of the grant at the lesser of—

(1) $200,000; or

(2) The amount requested by the applicant.

(Approved by the Office of Management and Budget under control number 1840-0549)

(Authority: 20 U.S.C. 1070a-11)


§643.24 What is the review process for unsuccessful applicants?

(a) Technical or administrative error for applications not reviewed. (1) An applicant whose grant application was not evaluated during the competition may request that the Secretary review the application if—

(i) The applicant has met all application submission requirements included in the FEDERAL REGISTER notice inviting applications and the other published application materials for the competition; and
(ii) The applicant provides evidence demonstrating that the Department or an agent of the Department made a technical or administrative error in the processing of the submitted application.

(2) A technical or administrative error in the processing of an application includes—

(i) A problem with the system for the electronic submission of applications that was not addressed in accordance with the procedures included in the FEDERAL REGISTER notice inviting applications for the competition;

(ii) An error in determining an applicant's eligibility for funding consideration, which may include, but is not limited to—

(A) An incorrect conclusion that the application was submitted by an ineligible applicant;

(B) An incorrect conclusion that the application exceeded the published page limit;

(C) An incorrect conclusion that the applicant requested funding greater than the published maximum award; or

(D) An incorrect conclusion that the application was missing critical sections of the application; and

(iii) Any other mishandling of the application that resulted in an otherwise eligible application not being reviewed during the competition.

(3)(i) If the Secretary determines that the Department or the Department's agent made a technical or administrative error, the Secretary has the application evaluated and scored.

(ii) If the total score assigned the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c) of this section.

(b) Administrative or scoring error for applications that were reviewed. (1) An applicant that was not selected for funding during a competition may request that the Secretary conduct a second review of the application if—

(i) The applicant provides evidence demonstrating that the Department, an agent of the Department, or a peer reviewer made an administrative or scoring error in the review of its application; and

(ii) The final score assigned to the application is within the funding band described in paragraph (d) of this section.
(2) An administrative error relates to either the PE points or the scores assigned to the application by the peer reviewers.

(i) For PE points, an administrative error includes mathematical errors made by the Department or the Department's agent in the calculation of the PE points or a failure to correctly add the earned PE points to the peer reviewer score.

(ii) For the peer review score, an administrative error is applying the wrong peer reviewer scores to an application.

(3)(i) A scoring error relates only to the peer review process and includes errors caused by a reviewer who, in assigning points—

(A) Uses criteria not required by the applicable law or program regulations, the FEDERAL REGISTER notice inviting applications, the other published application materials for the competition, or guidance provided to the peer reviewers by the Secretary; or

(B) Does not consider relevant information included in the appropriate section of the application.

(ii) The term “scoring error” does not include—

(A) A peer reviewer's appropriate use of his or her professional judgment in evaluating and scoring an application;

(B) Any situation in which the applicant did not include information needed to evaluate its response to a specific selection criterion in the appropriate section of the application as stipulated in the FEDERAL REGISTER notice inviting applications or the other published application materials for the competition; or

(C) Any error by the applicant.

(c) Procedures for the second review. (1) To ensure the timely awarding of grants under the competition, the Secretary sets aside a percentage of the funds allotted for the competition to be awarded after the second review is completed.

(2) After the competition, the Secretary makes new awards in rank order as described in §643.20 based on the available funds for the competition minus the funds set aside for the second review.

(3) After the Secretary issues a notification of grant award to successful applicants, the Secretary notifies each unsuccessful applicant in writing as to the status of its application and the funding band for the second review and provides copies of the peer reviewers' evaluations of the applicant's application and the applicant's PE score, if applicable.

(4) An applicant that was not selected for funding following the competition as described in paragraph (c)(2) of this section and whose application received a score within the funding band as described in paragraph (d) of this section, may request a second review if the applicant
demonstrates that the Department, the Department's agent, or a peer reviewer made an administrative or scoring error as provided in paragraph (b) of this section.

(5) An applicant whose application was not funded after the first review as described in paragraph (c)(2) of this section and whose application received a score within the funding band as described in paragraph (d) of this section has at least 15 calendar days after receiving notification that its application was not funded in which to submit a written request for a second review in accordance with the instructions and due date provided in the Secretary's written notification.

(6) An applicant's written request for a second review must be received by the Department or submitted electronically to the designated e-mail or Web address by the due date and time established by the Secretary.

(7) If the Secretary determines that the Department or the Department's agent made an administrative error that relates to the PE points awarded, as described in paragraph (b)(2)(i) of this section, the Secretary adjusts the applicant's PE score to reflect the correct number of PE points. If the adjusted score assigned to the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c)(9) of this section.

(8) If the Secretary determines that the Department, the Department's agent or the peer reviewer made an administrative error that relates to the peer reviewers' score(s), as described in paragraph (b)(2)(ii) of this section, the Secretary adjusts the applicant's peer reviewers' score(s) to correct the error. If the adjusted score assigned to the application would have resulted in funding of the application during the competition and the program has funds available, the Secretary funds the application prior to the re-ranking of applications based on the second peer review of applications described in paragraph (c)(9) of this section.

(9) If the Secretary determines that a peer reviewer made a scoring error, as described in paragraph (b)(3) of this section, the Secretary convenes a second panel of peer reviewers in accordance with the requirements in section 402A(c)(8)(C)(iv)(III) of the HEA.

(10) The average of the peer reviewers' scores from the second peer review are used in the second ranking of applications. The average score obtained from the second peer review panel is the final peer reviewer score for the application and will be used even if the second review results in a lower score for the application than that obtained in the initial review.

(11) For applications in the funding band, the Secretary funds these applications in rank order based on adjusted scores and the available funds that have been set aside for the second review of applications.

(d) *Process for establishing a funding band.* (1) For each competition, the Secretary establishes a funding band for the second review of applications.
(2) The Secretary establishes the funding band for each competition based on the amount of funds the Secretary has set aside for the second review of applications.

(3) The funding band is composed of those applications—

(i) With a rank-order score before the second review that is below the lowest score of applications funded after the first review; and

(ii) That would be funded if the Secretary had 150 percent of the funds that were set aside for the second review of applications for the competition.

(e) Final decision. (1) The Secretary's determination of whether the applicant has met the requirements for a second review and the Secretary's decision on re-scoring of an application are final and not subject to further appeal or challenge.

(2) An application that scored below the established funding band for the competition is not eligible for a second review.

(Approved by the Office of Management and Budget under control number 1840-NEW2)

(Authority: 20 U.S.C. 1070a-11)

[75 FR 65778, Oct. 26, 2010]

**Subpart D—What Conditions Must Be Met by a Grantee?**

§643.30 What are allowable costs?

The cost principles that apply to the Talent Search program are in 2 CFR part 200, subpart E. Allowable costs include the following if they are reasonably related to the objectives of the project:

(a) Transportation, meals, and, if necessary, lodging for participants and project staff for—

(1) Visits to postsecondary educational institutions;

(2) Participation in “College Day” activities;

(3) Field trips for participants to observe and meet with persons who are employed in various career fields and who can act as role models for participants; and

(4) Transportation to institutions of higher education, secondary schools not attended by the participants, or other locations at which the participant receives instruction that is part of a rigorous secondary school program of study.
(b) Purchase of testing materials and test preparation programs for participants.

(c) Fees required for admission applications for postsecondary education, college entrance examinations, or alternative education examinations if—

(1) A waiver of the fee is unavailable; and

(2) The fee is paid by the grantee to a third party on behalf of a participant.

(d) In-service training of project staff.

(e) Rental of space if—

(1) Space is not available at the site of the grantee; and

(2) The rented space is not owned by the grantee.

(f) Purchase, lease, or rental of computer hardware, software, and other equipment, service agreements for such equipment, and supplies that support the delivery of services to participants, including technology used by participants in a rigorous secondary school program of study.

(g) Purchase, lease, service agreement, or rental of computer equipment and software needed for project administration and recordkeeping.

(h) Tuition costs for a course that is part of a rigorous secondary school program of study if—

(1) The course or a similar course is not offered at the secondary school that the participant attends or at another school within the school district;

(2) The grantee demonstrates to the Secretary's satisfaction that using grant funds is the most cost-effective way to deliver the course or courses necessary for the completion of a rigorous secondary school program of study for program participants;

(3) The course is taken through an accredited institution of higher education;

(4) The course is comparable in content and rigor to courses that are part of a rigorous secondary school program of study as defined in §643.7(b);

(5) The secondary school accepts the course as meeting one or more of the course requirements for obtaining a regular secondary school diploma;

(6) A waiver of the tuition costs is unavailable;

(7) The tuition is paid with Talent Search grant funds to an institution of higher education on behalf of a participant; and
The Talent Search project pays for no more than the equivalent of two courses for a participant each school year.

(Authority: 20 U.S.C. 1070a-11 and 1070a-12)


§643.31 What are unallowable costs?

Costs that are unallowable under the Talent Search program include, but are not limited to, the following:

(a) Stipends and other forms of direct financial support for participants.

(b) Application fees for financial aid.

(c) Research not directly related to the evaluation or improvement of the project.

(d) Construction, renovation, and remodeling of any facilities.

(Authority: 20 U.S.C. 1070a-11 and 1070a-12)


§643.32 What other requirements must a grantee meet?

(a) Eligibility of participants. (1) A grantee shall determine the eligibility of each participant in the project at the time that the individual is selected to participate.

(2) A grantee shall determine the status of a low-income individual on the basis of the documentation described in section 402A(e) of the HEA.

(b) Number of Participants. For each year of the project period, a grantee must serve at least the number of participants that the Secretary identifies in the FEDERAL REGISTER notice inviting applications for a competition. Through this notice, the Secretary also provides the minimum and maximum grant award amounts for the competition.

(c) Recordkeeping. For each participant, a grantee must maintain a record of—

(1) The basis for the grantee's determination that the participant is eligible to participate in the project under §643.3;

(2) The grantee's needs assessment for the participant;
(3) The services that are provided to the participant;

(4) The specific educational progress made by the participant as a result of the services; and

(5) To the extent practicable, any services the TS participant receives during the project year from another Federal TRIO program or another federally funded program that serves populations similar to those served under the TS program.

(d) Project director. (1) A grantee must employ a full-time project director unless—

(i) The director is also administering one or two additional programs for disadvantaged students operated by the sponsoring institution or agency; or

(ii) The Secretary grants a waiver of this requirement.

(2) The grantee must give the project director sufficient authority to administer the project effectively.

(3) The Secretary waives the requirements in paragraph (d)(1) of this section if the applicant demonstrates that the project director will be able to effectively administer more than three programs and that this arrangement would promote effective coordination between the TS program and other Federal TRIO Programs (sections 402B through 402F of the HEA) or similar programs funded through other sources.

(Approved by the Office of Management and Budget under control number 1840-NEW2)

(Authority: 20 U.S.C. 1070a-11 and 1070a-12)

Creating a Program Policy and Procedures Manual

Lucy Jones
TRIO Consultant
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Improving Quality of TRIO Program

- A well-organized manual is a critical tool for staff orientation and training.
- The manual should fully detail your program’s plan of operation and related procedures so that someone unfamiliar with your day-to-day activities could use it as a map and guide.
- Following the guidelines of a well-structured manual will position you well for audits and/or site visits.
Policy and Procedures Manual Components

The following information is taken from *Creating a Program Policy and Procedures Manual*, published by the Council for Opportunity in Education.

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Step 1 – Defining the Mission of Your Program

What is the mission statement for your project?

If you have multiple TRIO programs, each should have its own mission statement?

How does the project mission statement integrate with the institution’s mission statement?
Mission Statements

“The TRiO Student Support Services Program (SSSP) at XXX empowers first-generation college students, low-income students and students with disabilities to explore and engage with their educational and personal goals. It offers comprehensive academic and personal support designed to assist with persistence to graduation and graduate school and career preparation.”

“Our mission is to assist low-income, first generation students to overcome the cultural, academic, class, and social barriers to success in higher education.”

“The TRiO Student Support Service program at XXX is committed to increasing the rates of academic achievement, retention, and graduation among historically underrepresented students. This is accomplished by providing holistic and individualized support services that maximize students’ innate abilities and draw upon available resources within and outside of the University to benefit students, families and the larger community.”

Sample Mission Statements
Step 2 – Creating a Historical and Regulatory Framework

- Higher Education Opportunity Act (2008 reauthorization)
- Project Regulations
- EDGAR, Part 75
- OMB Uniform Guidance
- Approved grant proposal

Step 3 – What Did You Promise and to Whom?

- What are your project’s objectives?
- What activities help to meet or fulfill project objectives?
- How successful have you been in accomplishing your project’s objectives?
Objectives and Activities

<table>
<thead>
<tr>
<th>Objective 1 (Repeat for each Objective)</th>
<th>Activities Needed to Accomplish Objective</th>
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</thead>
<tbody>
<tr>
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Prior Experience Report

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<th>Maximum Points Allowed</th>
<th>Approved Rate</th>
<th>Actual Attained Rate</th>
<th>PE Points Earned</th>
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<tr>
<td>Persistence</td>
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<td>65%</td>
<td>94%</td>
<td>4</td>
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<tr>
<td>Good Academic Standing</td>
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<td>80%</td>
<td>97%</td>
<td>4</td>
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<td>68%</td>
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<tr>
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<td>20%</td>
<td>52%</td>
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<th>Number of Participants Served</th>
<th>Percent Served</th>
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<tr>
<td></td>
<td>15</td>
<td></td>
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</tr>
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</table>
Step 4 – Organizational Charts and Institutional Placement

- Where is your program located within the institution’s or agency’s organizational structure?
- Create an additional chart for the internal structure within your TRIO program.
- Create a chart that illustrates the relationship of the project with key institutional entities.
- Create a chart that shows the cooperative partnerships or relationships with other programs at the institution.

Step 5 – Job Descriptions, Supervision, and Staff Evaluation

- Staff recruitment, advertisement, and selection process
- Training requirements and professional development opportunities
- Policies for supervising staff
- Personnel evaluation tools
- Job descriptions
- Résumés for current staff
- Disciplinary process
- Schedule of standard meetings
Step 6 – Who Does Your Program Serve?

- Eligibility requirements for participants
- Low Income chart
- How do you identify and select students?
- How do you determine academic need?
- When is a student considered a participant?
- Explain the difference between an “active” participant and an “inactive” or “prior” participant.

Step 7 – How Does Your Program Function?

- Flow of activities from time potential participant enters project to when participant leaves project
- Timeline of activities
- What constitutes a participant contact?
- Samples of all forms
- Institution’s strategic plan
Step 8 – Clarifying the Documentation Process

- List all forms of documentation needed to prove participant eligibility for your project.
- Participant file review checklist
- Mandatory/permissible services delivered and documented

Step 9 – Ensuring that Data Is Backed Up and Verified

- Who collects data and when?
- Deadlines for collection of data
- How is data collected?
- Where is data kept and in what format?
- How is data backed up?
- How is data verified?
Step 10 – Project Evaluation: Internal Assessments and Safeguards

- How are objectives evaluated?
- How are project elements evaluated?
- How are project files audited?

Step 11 – Inventory and Other Internal Controls

- Descriptive list of all program equipment and purpose of equipment, serial number, and location
- Institutional or organizational requirements for inventory control
- Confidentiality of participant records
- Samples of information, recruitment, and public relations materials for your project
Step 12 – Describing the Fiscal Process and Budget Management

- How do you reconcile your budget?
- How and where are fiscal records kept?
- Document accounting system or software package
- How do you order items?
- How is travel documented?
- What is the process of maintaining timesheets and documenting time and effort

Step 13 – Preparing for Emergency Situations

- What are the project’s contingency plans?
- What are the institution’s evacuation plans?
- What is unique about your geographic area that would affect your contingency plans?
Step 14 – Topics Unique to the Nature and Shape of Your Program

- What are standards/policies that are unique to your type of program?
- Pre-college; collegiate program?
- Stipends? Grant aid?
- Summer programs?

PROCEDURES MANUALS ARE LIVING DOCUMENTS!

- Update Once or Twice a Year
- Insert New Chapters
- Arrange Format To Add Sections to Current Chapters