***NOTE: This table replaces Tables 2-2a to 2-2h on pages 2-12 to 2-21 of the 2020 version***

***of the TAM posted on the MTGU website.***

Please note: approved Expenditures must have a purpose outlined in the request. MTGU will not approve or reimburse for items prohibited by federal or grant program guidelines.

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| Table 2-2a. MTGU Guidelines for Specific Costs – Chaperoning/Professional Development |
| **Chaperoning/Professional Development***These guidelines primarily apply to staff working outside of the academic year (i.e., during the summer period).* These items will fall under personnel expenses.  |
| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| Chaperone Pay or Stipend | Chaperoning activities include riding in a bus or car, staying in a motel, and/or attending an activity for the purpose of managing and assisting students during GEAR UP supported activities. | The maximum reimbursable rate is $15 per hour. The maximum hours per day is 16.  | Time over 16 hours in a 24-hour period. |
| Driver Pay or Stipend | Hourly rate can be applied for student activities for which a school vehicle is used. Hours should include all time on a given trip in which payee is designated as a driver. | The maximum reimbursable rate is $20 per hour. | Paying a parent to drive. |
| Professional Development Stipend | Stipends can only be offered to staff beyond their contracted time (e.g., during summer period).  | District rates for beyond contract time should be followed. In the absence of an established district policy, the maximum stipend rate is $100 per day. Written district policy may be requested for documentation purposes. | Stipends offered to staff if college credit will be earned, or certifications will be awarded.For out of region PD. |

| Table 2-2b. MTGU Guidelines for Specific Costs – Guest Speakers/Facilitators |
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| **Guest Speakers/Facilitators*** *Speaking and facilitator fees shall be no more than 10% of a school’s total annual or summer budget.*
* *Content must focus on college/career planning, educational achievement, or other skills and abilities related to academic success. It is strongly recommended that permission is obtained from the GEAR UP program prior to booking a speaker.*
* *These items will be placed in the contract section of the budget. No funding can be used for anyone banned or restricted on SAM.gov.*
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| Item | Sample Purpose | Reimbursable *Amounts do not include**shipping and handling fees* |  Not Reimbursable |
| Contracts for motivational speakers and student workshop facilitators | College/career planning and awareness.Leadership and soft skill development.Preparation or motivational. | Up to $3,000 for professional speakers or trainers per event. Not to exceed speaking fees of more than $6,000 per school year.Please outline how speaker’s or trainer’smessage will be reinforced or used after the event has concluded.  | Individual speaker or trainer fees over $3,000. |
| Honoraria for motivational speakers, workshop facilitators, or college students participating on a student panel | A payment for “usual academic activity or activities” with the intent of showing appreciation for participation or services provided. Activities may include but are not limited to lecturing, teaching, sharing knowledge, performance (when the audience is composed of non-paying students and/or open to the general public free of charge). | Up to $500 honorarium for non-professional speakers per school year. Not to exceed $3,000 per year for all honorariums combined. A token of appreciation honorarium is capped at $25 per person, per event.The appropriate documentation must be collected and filed at the school (at a minimum, a flyer or memo documenting the recipient’s participation in the speaking event and a Form W9). The school is required to prepare and submit 1099 documents (taxable income) to the IRS and the recipient of the honorarium. | Honorarium over $500 per speaker in a year or a combined number of honorariums for all speakers in excess of $3,000 per year. |

| Table 2-2c. MTGU Guidelines for Specific Costs – Academic Success Tools  |
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| **Academic Success Tools***Tools to help students attain post-secondary education; the combination of Academic Success Tools and Incentives shall be no more than 2% of a school’s total annual or summer budget. At the State’s discretion, over 2% may be considered.*  The budget category for the following items will fall under operating costs: consumable supplies, student travel, staff travel, college application fees, AP/dual credit, or other.Please note that items deemed incentives must have a strong rationale given at the time of the request that demonstrates how the items relate to GEAR UP goals and objectives.  |
| Item | Sample Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| Academic Success Packages | **For first-year college students only.** Only reimbursable in local budget for students not attending a college with GU first year services; must be delivered in fall; the purpose is to use the opportunity to remind the student to complete their FAFSA and determine if there are any supports needed. | Follow guidelines below; Postage is allowable. Backpack: Maximum of $20.Maximum of contents is $20. | Not reimbursable after January. Laundry products or bags, toiletries, hygiene products are not allowable.  |
| Backpacks 7-12 | Empty backpacks can be used to support student success for 7-12 students but should be distributed in the first half of the year, with a priority given to students with need. | Up to $20 each | Not reimbursable after January. |
| Calculators | For students who need them for use in math classes. To recognize improvement or effort to master math skills. | Up to $20 each | Not reimbursable if ordered after March 31st. |
| Educational or quick reference guides  | Laminated or other guides on core subjects or for use with advanced placement or dual enrollment classes (e.g., college algebra formulas, APA/MLA writing styles, science, math, English). To provide a useful tool for students pursuing rigorous coursework. | Up to $9.00 http://www.barcharts.com/products/reference-study-guides/http://www.quickstudy.com/laminated-reference-guides/ |  |
| Flash drives | Flash drives promoting GEAR UP, loaded with materials for college and career units, or used to store class content or portfolios. | Up to $10 each. Please note: 2023-2024 is the last year these will be allowable. | Flash drives for every student. |
| School supplies (pens, pencils, color pencils, binders, folders, index cards, paper, rulers, math compass, highlighters, mini staplers, markers, graphing paper, sticky notes, and other school supplies.) | **Orientation kits for students in grades 7-12** with various Academic Success Tools; to be used in conjunction with the transition service; must be given at the beginning of the year, to entice student to attend orientation and assure they have basic tools needed to complete schoolwork. | Up to $20 per student per annual budget including the cost of any pouch or drawstring bag purchased to hold the items.  | Not reimbursable after January.  |
| Technology | Computers that increase the capacity to do complex science, mathematics, or other coursework that cannot be purchased with other funding.**PLEASE NOTE:** Items over $500 must be inventoried and have a GEAR UP sticker added to them during the next site visit. Please track their location to make this process easier. When an item is replaced, recycled, or use is discontinued, schools must inform Montana GEAR UP and provide the number on the sticker.  | May be considered in limited quantities, upon review of school replacement plan or receipt of an attestation that item(s) is not supplanting what is needed for everyday operation. *Items may never be given away.*1 desk computer with two monitors for liaison’s exclusive use.  | Items requested to replace broken, damaged, or obsolete equipment that the school should supply. Computer for liaison in last two years of grant cycle or more frequently than once in 5 years.Classroom sets of computers or for projects that do not align closely with GU objectives or classwork. If ordered after March 31st.  |
| Liaison supplies | Additional Items or supplies specifically related to the GU position.  | File cabinet or similar, to safely store student records, may be considered. | Furniture, stand up desks, chairs, building supplies, etc.Items or supplies the school is expected to supply for liaison to do their job. |

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| *Table 2-2d. MTGU Guidelines for Incentives*  |
| ***Incentives****Rewards and enticements for parents and students to increase participation in GEAR UP services* *or recognize improvement in behavior, attendance, or grades; the combination of Academic Success Tools and Incentives shall be no more than 2% of a school’s total annual or summer budget. Only one incentive can be offered per parent event or community event.* |
| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| Clothing items that promote school, college, and other GEAR UP activities | College apparel for “Decision Day” and T-shirts for college visits, educational field trips, etc., to promote GEAR UP and ensure student safety. | Up to $20 per item*This amount includes printing and/or setup charges if applicable.* | Items without a GEAR UP logo or a college or career message.Distribution to adults- staff, volunteers, guest speakers, etc.Gifts, gift cards, gift certificates, or cash.Items may not be distributed to non-GEAR UP students.Excessive number of items to individual student(s). Items of entertainment.Items associated with a fundraiser.  |
| College logo items: Hats, scarves, bags, pennants, magnet, key chains, reusable coffee mugs, socks, lanyards  | Items with a GEAR UP logo or college/career logo, such as those from a college bookstore.The purpose is to recognize improvements in academics, attendance, or behavior.   | Up to $10 each*This amount includes printing and/or setup charges if applicable.* |
| Water bottles | For students attending a campus visit for hydration and safety. Must have a GEAR UP logo on it.  | Up to $20 each |
| Event Food + Incentive | Food provided at the school, to increase family participation in activities that closely tie to GEAR UP objectives and are in the approved budget.  | One (1) or more incentives, up to a maximum of $25 can be offered per family event or community event. Maximum Snack $3, Breakfast $8, Lunch $10, Dinner $18 for parents and students.2 guests per single student.  | Staff may not receive incentives or be included in the food count. Gift cards or certificates.Food for guests in excess of 2 per student. |

| Table 2-2e. MTGU Guidelines for Grant Activity Supplies |
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| Grant Activity SuppliesSupplies Used for GEAR UP Services or EventsFor this section only, the State will decide on a case-by-case basis if costs may exceed stated limits. |
| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| Books*See also “Textbooks” and “Magazines”* | Educational and career books, schoolwide novels, books for teacher’s professional development | Up to $20 per item*This rate does not apply to teacher’s manuals or literature used for professional development.* | Books required to teach the class. |
| Classroom Calculators  | TI-84 or similar calculators and caddy; **calculators** **become property of the classroom.** Purpose to facilitate students taking rigorous courses.  | Up to $165 per single calculator; $100 for a caddy. Generally, this will be one set per class.  | Not reimbursable after January 1. |
| Candy or pop used in academic demonstrations. | Purpose to demonstrate principles of chemistry or physics. Must provide the lesson plan and get approval prior to purchase. | Up to $75 per year. | Candy purchased for any other purpose, including icebreakers. |
| Event consumables | Disposable tableware to facilitate a quick transition from eating to receiving workshop content. | Up to $35 per event |  |
| Educational games | Games that promote math, reading, reasoning, or language acquisition. | Up to $20 each.Crash Course, Success Works is reimbursable up to $75 or current price. | Games deemed entertainment. |
| Headphones for classroom use- these stay with the district. | For use in situations when the student needs quiet to do their work with online software and learning programs, or during testing. | Up to $35 | Virtual reality headsets/ items. |
| Magazines and magazine subscriptions | Scholastic MATH magazine and Science World magazine for academic enrichment in math and science classrooms, English | Up to $11 per issue | Magazines deemed entertainment. |
| Online Educational Subscription | Newspapers or journals that are used in a classroom for an educational or cultural purpose. Content should align with GEAR UP and class objectives.  | Up to $100 annual fee, with a maximum of 5 different subscriptions. Should be ordered for use in the fall. | Subscriptions already paid for by the school for classroom or library.Entertainment, sports, career, or technical education related.Not reimbursable after January 1.Requests over $500. |
| Textbooks | For rigorous coursework (e.g., textbooks for college-level courses such as AP US History, AP US Government, AP Language Arts, AP Literature, and dual enrollment/dual credit classes) | Full costs of books are reimbursable *See* ***Table 2-2e*** *for tuition and test fee guidelines.* | Books that are used to teach the class that the school is required to provide.  |

| Table 2-2f. MTGU Guidelines for Specific Costs – Meal, Beverage, Snack, Travel Allowances |
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| Meal, Beverage, Snack, and Travel AllowancesFood and beverages may be offered to students/families only in conjunction with GEAR UP structured activities where participants receive GEAR UP information, per the following guidelines. |
| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| Meals during student travel  | Meals for students, chaperones, (e.g., teachers, liaisons, counselors), and bus drivers traveling to college and career fairs, educational field trips, college visits, etc. Meals that a chaperone does not eat with the students will be reduced to per diem | Meal rate maximums include beverages. *Per-person rates:* $8 breakfast, $10 lunch, $18 dinner ($36/day)*Out of state per-person rates:* $13 breakfast, $15 lunch, $26 dinnerIt is the responsibility of the liaison or designated host to ensure that meal rates are not exceeded, and actual itemized invoices/receipts are collected and filed at the school.*These rates do not include gratuity if applicable. Gratuities must be reasonable (15-18%) and in line with normal practices.* | Meals in excess of the number of people students, chaperones, and driver. Meals and/or tips that exceed the allowable amount or the allowable amount for the time of day will be reduced to the allowable amount. One warning may be issued. Meals paid with a credit card will not be reimbursed if no itemized receipt is provided. Candy for consumption. |
| Meals/ refreshments for student and family activities in the evening or on the weekend | Food for family or student at GEAR UP events. **(Do not include staff in budget requests unless they are traveling.)** | ***Catered meals must follow the designated rates noted above.***It is the responsibility of the liaison or designated host to ensure that meal rates are not exceeded, and actual itemized invoices/receipts are collected, filed at the school, and provided during fiscal reports.The state GEAR UP team will use the reasonable and prudent rule to determine if requests for reimbursement are allowable for the number of attendees. | Meals for staff during family or student activities. Montana GEAR UP may reduce reimbursement if excessive food is purchased for the number of students and guardians present. Meals paid with a credit card will not be reimbursed if no itemized receipt is provided. Food purchased through a fund raiser. |
| Welcome back orientations or similar events the school hosts as a school wide event. | The purpose is to inform families of the GEAR UP objectives and services that GEAR UP will provide during the year. It is an opportunity to meet the liaison. | Light refreshments of $3 per individual student. Requests will be reviewed for reasonableness. | Orientations or events the school would fund in the absence of GEAR UP. |
| End of year celebrations | Activities associated with Decision Day, I pledge to graduate, or transition service may be allowed, if they are not part of the traditional graduation events.  | Light refreshments of $3 per individual student. Requests will be reviewed for reasonableness.1 banner for pledges to graduate limited to $25 per grade (cost includes set up fees).$1 per graduating student for supplies to make graduation posters for school walk through celebrations. | Costs associated with traditional graduation like caps, gowns, diplomas, decorations, music and supplies. |
| Student Meals during the school day, at the school | Generally, not reimbursable. | Written permission required.  | Limited exceptions may be made for student events that limit access to regular mealtime.  |
| Meals for staff travel (per diem) | Per diem for staff attending events that align with GEAR UP objectives such OPI Indian Education for All Best Practices Conference and Montana College Attainment Network Conference. | Per-person rates: $8.25 breakfast, $9.25 lunch, $16.00 dinner Out of state per-person rates: $13 breakfast, $15 lunch, $26 dinner  | Staff meals for staff meetings, GEAR UP events, or professional development are not allowable unless staff are in travel status. Meals and/or tips that exceed the allowable amount will be reduced to the allowable amount.Alcohol.*Meals included in the cost of a professional development registration cannot be requested as per diem.* |
| College/Career Fairs hosted by School | Light refreshments or meals for presenters | Up to $3 for presenter for light refreshment. Up to $10 per presenter for a meal.  | School staff may not be included.Meals for less than a full day event.  |
| Transportation | For educational field trips, cultural, or campus visits. | Transportation (cars and buses) and lodging at current per diem rate announced by state team. Ask school grant manager for the most current rate. \*Car rate .315 per mile. \*Bus rate of $1.15 per mile. The highest OPI rate may be reimbursed at the state’s discretion for trips where more than 60 people are on the bus. \*Van rate of .50 a mile. | Personal vehicles.Limo transportation. |
| Travel for professional development | Supports building a college and career culture, culturally and best practices, to improve instruction and school climate.  | For professional development on/off site that aligns closely with GU goals and Objectives. Use of GU funds to pay staff to attend training requires pre-approval.Ask the school grant manager for applicable mileage and per diem rates. Lodging rates should be at state rate, or at/below cost for lodging at conference venue. | Out-of-region professional development.Rental cars.Late registration or cancellation fees.Travel insurance, travel agent fees, booking fees.  |
| Lodging | Purpose to allow for student campus visits, educational or cultural field trips, or for professional development.  | Districts must ask for the state rate for student and staff travel. In high-cost areas or during high-cost times of the year, schools must seek preapproval for costs that exceed the state rate. | Reimbursement may be lowered to the state rate for a high-cost area if costs are higher than expected for the location for the time of year, without evidence of pre-approval.  |
| Snacks | Snacks for students/parents attending GEAR UP activities. May be provided for GEAR UP required assessments (Mosaic, PreAct ACT testing) and FAFSA events. Must be healthy, nutritious snacks (granola bars, string cheese, fruit, popcorn, trail mix, pretzels, crackers, milk, juice, yogurt, bagels, muffins). | Up to $3 per student; primarily for use during educational field trips and assessments.Up to $3 per student where a refreshment is needed for family events or parent teacher conferences. Requests will be reviewed for reasonableness. | Candy, pop, or similar items with negligible nutritional value.MTGU will not reimburse for expensive coffee. Snacks for afterschool programs will not be allowed when the school has a USDA food and nutrition service.  |

| Table 2-2g. MTGU Guidelines for Specific Costs – Tuition and Fees |
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|  **Tuition and Fees** |
| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
| College application fees | College application fees for students; after free ones during college application week. | Maximum of $200 total per student.  | For institutions not accredited to receive financial aid. |
| Tuition and test fees for students- **reimbursable after they used up 1, 2, Free** | Tuition and test fees (AP/dual enrollment) for college credits are reimbursable for 11th and 12th grade students, as well as other students as approved. Students must be enrolled prior to high school graduation.Purpose is to encourage rigorous coursework to reduce the need for remediation in college. Students should be encouraged to take rigorous courses. | Full costs of tuition and test fees are reimbursable.Non-mandatory fees that are not required for participation.*See* ***Table 2-2c*** *for textbook guidelines.* | For students after graduation. Late fees.Prepaid exam costs that went unused. |
| College orientation fees | Purpose is to increase family participation in precollege orientation.  | See guidelines under student travel vouchers. | Any orientation costs that are part of a student’s quarter/semester bill. Orientation fees not in the approved local budget. |
| Tuition and credit fees for staff | Always unallowable, though valuable. |  |  |

### Table 2-2h MTGU Guidelines for Travel Vouchers

Travel vouchers are for the express purpose of increasing parent/guardian engagement and college access. Schools issuing vouchers must follow their district policies. Reimbursed travel must comply with local district policies.

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| *Student Travel Vouchers**Vouchers for Campus Visits or Orientation: Maximum allowable 1 voucher per year, per student, up to a maximum of $500. Vouchers are restricted to students who are in 11th grade or 12th grade and the summer following graduation. Reimbursement is to help offset the cost, not cover entire cost. Voucher use requires having the vouchers in an approved annual or summer budget. Reimbursement requires written proof of visit or attendance at orientation. \** |

| Item | Purpose | Reimbursable *Amounts do not include shipping and handling fees* |  Not Reimbursable |
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| Mileage | To increase family involvement in college selection and attendance at orientation.Students may explore in 11th grade and attend orientation immediately following their graduation at the end of 12th grade.The purpose is to help families offset the cost of college selection or attendance at orientation. | Reimbursement for car travel to in-region campuses *is limited to Google verified miles for point A to B* and does not include side trips. Rate is .315 a mile.Mileage reimbursement for trips involving air travel will only be reimbursed from local school/city to departure airport.Ask school grant manager in advance if a trip is considered within region. | Plane tickets.Out of region trips.More than two visits per student.Expenses that lack proper documentation. Student travel expenses without an adult family member with them. |
| Food | To increase family involvement in college selection and attendance at orientation.The purpose is to help families offset the cost of college selection or attendance at orientation. | Food is capped at 1 student and 1 parent/caregiver$8.25 breakfast$9.25 for lunch$16.00 for dinner*Receipt is not required.* | Meals for more than 2 family members. |
| Lodging | To increase family involvement in college selection and attendance at orientation.The purpose is to help families offset the cost of college selection or attendance at orientation. | 1 night/room allowable after 150 miles one way (or over 300 round trip)Maximum of 2 nights allowable after 500 miles one way (or over 1000 miles round trip). Up to $125 including taxes/fees.*Motel receipts with a zero balance are required, even when paid with a credit card.*Lodging on campus may be considered, regardless of miles traveled, if preapproval is given in writing. Contact the school grant manager. | Lodging on trips less than 300 miles round trip.Reimbursement of $125 when the room cost less.Expenses that lack proper documentation. More than $250 in lodging on a visit or for orientation. Credit card receipts without an itemized list showing a zero balance.  |
| Orientation Fee | To increase family involvement and attendance at orientation. The purpose is to help families offset the cost of college selection or attendance at orientation. | Cost of orientation if it is not added to first quarter/semester bill.Not to exceed $150*Receipt Required.* | Fees that are added to a student’s bill. Expenses that lack proper documentation.  |

\*Example of “proof of visit” or “attendance at orientation” includes items like orientation agenda signed by leader, student listed in names orientation attendees, e-mail confirmation from orientation confirming attendance, signatures from each department visited during the campus visit.

**Form 6B Family Travel Voucher** (see Section 4 of TAM Commonly used forms) is required to be included in requests for reimbursement, along with proof of visit and documentation of expenditures.