Letter of Intent for the State Technology Enhancement Competitive Grant (170-B)
From the University of Massachusetts, Boston

Proposal:
The University of Massachusetts Boston proposes to create a videotape archive of best classroom practices for teaching and learning within the commonwealth. Video snapshots of exemplary lessons would be created, organized by grade and content area and made available to all districts in the state through video streaming technology. Access would be managed through the Virtual Education Space, (VES) where materials would be catalogued and matched to DOE curriculum standards and existing lesson plans.

Conditions in place:
The UMB Graduate College of Education is one of seven colleges at the University of Massachusetts Boston that participates in the preparation of school professionals. In 2002, it was fully accredited by the National Council for the Accreditation of Teacher Education. The UMB Distance Learning Video Production Center uses the MITI line to deliver programs in-state and has recently expanded to include access to Internet 2. Resources include providing streaming video and audio for use in online courses.

Potential Uses:

- The UMass Boston Graduate College of Education would expand existing opportunities to high needs, urban and suburban districts by bringing together educators from different grade levels, (elementary to college) to work cooperatively to develop and implement a vertically aligned program. Through a customized "train-the-trainer" model districts would participate in online professional development that would help them determine how to integrate the videos into existing professional development, mentoring or induction programs.
- Self directed districts could integrate the videotaped segments into existing professional development by requiring teachers to identify and evaluate lessons using a rubric that would assist in the process. Districts could then extend the activity by asking participants to create a lesson plan. Both documents could be submitted to receive PDP points from their district.

Partners: An advisory board would be assembled to include representatives from the DOE, the university and participating member districts. Currently five districts have agreed to participate; Revere, Hanover, Marblehead, Burlington and Tantasqua, (Brimfield, Brookfield, Holland, Sturbridge and Wales). Salem, Medford, and several other districts have expressed interest and may be on board before the 7/1 deadline. The board would establish the criteria for classroom best practices and recommend teachers who fit the criteria. Representatives from the board would then screen potential teachers, do site visits and select classrooms based upon the subject areas selected as a focus. Content rather than methodology would be highlighted so that users could gain practical insight that could be applied immediately. It should also be noted that while partnering districts will have an active role in producing and utilizing the materials every district in the state will have access to the video streams and instructions on how to integrate them into their existing professional development.

Robert Kelley 6/8/2005

Conclusion: Sharing best practices within the teaching profession can be accomplished in many forms, from the scholarly study at the university level through the informal sharing of lesson plans within districts. But one key element that is most often missing is actually "seeing" good instruction at its most important level, the classroom. Leveraging the advances in online technologies now make it possible for teachers to "visit" classrooms throughout the commonwealth and to "experience" best practices through the use of video streaming. Adding this valuable resource to the existing options for professional development will help increase the quality of teacher training at every level.

Thank you for your consideration,

Robert Kelley, E.d.M.
University of Massachusetts, Boston
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Part B: NARRATIVE COMPONENT

1. *Needs Assessment*

1.1 Professional development for teachers and administrators can be accomplished in many forms, from the study of pedagogy at the university level to the informal sharing of lesson plans within districts. While the methods and goals of the varied approaches may differ one common element exists. Teachers want and need to "see" good instruction at its most important level, the classroom. Classroom VISITS, (Video Insights into Standards In Teaching Success) will allow new teachers to regularly observe master teachers through a guided process that combines the study of pedagogy with specific content knowledge and classroom management techniques.

Classroom VISITS proposes to identify and videotape best practices in K-12 classroom instruction in the areas of science and mathematics and to assist districts in the process of integrating these vignettes into their existing professional development programs.

1.2 The infrastructure already exists to allow **every** district in the state access to Classroom VISITS materials. Best classroom practices would be videotaped, edited and digitized by the staff at the Instructional Media Center at the University of Massachusetts Boston. Videotaped segments would then be placed on the University of Massachusetts video server, which can be accessed via the World Wide Web using a media player available through any browser. The university's video server has a stable footprint that extends throughout the entire state.

Access would be managed by the state sponsored Virtual Education Space (VES). We propose to build a special site within VES to catalogue and match vignettes to the extensive materials already housed in the portal. Videos would reference curriculum standards and existing lesson plans and a self directed tutorial would be created to help districts link materials to their existing professional development activities occurring within VES. In addition, the university would facilitate the sharing of curriculum templates and strategies for professional development.

1.3 The amount of technology proficiency a teacher possess may indirectly change due to exposure to VES and the use of video streaming but neither require advanced skills nor will they make the user more technically proficient. The goal of this project is not to make teachers more proficient with technology but to leverage an attribute of technology that will make teachers more proficient. It is difficult for a single district to identify model teaching, in all subject areas and grade levels, and then work the logistics that allows for the sharing of these practices between teachers. The scheduling and release time alone becomes a burden. By capturing on video an exemplary lesson new teachers can benefit from the wisdom of their more experienced collogues without disrupting their schedules or individual classrooms.

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2. *Goals/Objectives/Outcomes*

2.1 The goal of Classroom VISITS is to allow new teachers to regularly observe master teachers through a guided process that combines the study of pedagogy, with specific content knowledge, and classroom management techniques. To accomplish this goal there are three objectives:

1. Create an advisory board for the purpose of identifying the criteria for best classroom practices and selecting teachers and lessons in each discipline to fit those criteria.
2. Assist districts in the process of integrating these vignettes into their existing professional development programs.
3. Videotaping best classroom practices.

The outcomes for the advisory board would be to:

- determine the grade levels and content areas to be videotaped in mathematics, science and English language arts (language arts?)
- create a rubric to determine what best classroom practices are.
- find within our partnering districts classroom teachers that meet the standards
- videotape teachers who can demonstrate those practices.

A secondary outcome of the advisory board would be to create collaboration between our partnering districts and the Graduate College of Education that would allow for the sharing of curriculum templates and strategies that could help less developed district to identify their strengths and weaknesses so that they could begin to reexamine their professional development initiatives.

The outcomes for helping districts to integrate vignettes into existing professional development would be to:

- have the Graduate College of Education facilitate the sharing of curriculum templates and strategies for professional development.
- create a self directed tutorial in VES that would include descriptions, and implementation strategies
- link vignettes to mathematics, and science standards
- create a resource center that links current teaching and learning theory, content area research, and classroom management techniques to the vignettes
- create a viewing rubric that could be used by teachers to direct their attention and provide connections to current practices

The outcomes for the creation of videotaped vignettes would be:

- by the end of the 2 year grant cycle to create 20 vignettes; 10 on the subject of mathematics, 10 in science.
- digitize materials and place on the University of Massachusetts video server
- create links to video files in VES so that every district can access them

2.2 Classroom VISITS will support teaching and learning in mathematics and science by providing new materials for teacher professional development in each of these core

areas. The videotaped examples of best practices will focus be on specific areas of need in each discipline which will be identified by the advisory board and developed so that teachers can gain practical insight that can be immediately applied.

In addition to the videos there will be support materials that will help professional development planners to understand how Classroom VISITS can enhance their existing professional development plans or a complete professional development initiative can be facilitated by the UMB, Graduate College of Education. By making the materials available to every district through VES we plan to allow districts to decide how best to integrate them.

2.3 Increasing the quality and availability of professional development opportunities for teachers is a critical component that will address the shortage of qualified teachers especially in mathematics and science. More and more the burden of certification and retention falls on individual school districts who must find internal solutions for problems that are national in scope. Classroom VISITS is structured so that districts have control over how they can use the resources to increase the capacity of their teachers. Because districts will determine how they utilize Classroom VISITS collecting data on its impact will differ with each partner district and with those self directed districts that access the materials through VES.

The impact on partners who participate as advisory board members with the Graduate College of Education will include 8 districts and 50 administrators and teachers for the first year of the grant. Participation will include attending 6 meetings and regularly collaborating within VES. In addition teachers will be screened and videotaped.

Once materials are produced each district will use Classroom VISITS as part of their existing professional development. Some will conduct face-to-face workshops that use the vignettes and support materials as a starting point for discussions; others will blend both the virtual and face-to-face resources while others might also integrate the vignettes into existing online courses. The impact on partner districts that integrate materials into existing professional development includes 8 districts and 160 teachers for 10 hours.

To increase the impact on non-partnering districts we will actively promote the project at area functions and provide access to the self guided tutorial that explains how to integrate materials into existing professional development. It will be difficult to calculate how many non partnering districts will use the materials but all districts, administrators and teachers will have access to the materials. If only $1/3^{rd}$ of the non-partnering districts and teachers used Classroom VISITS that would involve over 100 districts and thousands of teachers.

3. *Implementation Strategies, Activities, Professional Development and Timeline*

3.1 Implementation Strategy:

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Developing a sense of ownership by the participating districts is a critical step toward assuring that the vignettes will be accepted. It would be a mistake if the university or the DOE were to determine outcomes without consent from those who would be using the materials. That is why involving each partner in the planning process is built into the application. A district is more likely to integrate new materials and methods if they have been active in the creation of those materials. There is also a huge opportunity for each partner to learn and grow through the process of gaining consensus. Through the sharing of ideas, materials and strategies much can be accomplished beyond the defined goals.

Activities:
Advisory Planning Board: the advisory board will consist of members from the partnering districts, the DOE, and the University of Massachusetts Boston. They will meet both face-to-face and virtually in VES to establish the criteria for best classroom practices. Districts will negotiate a set of common standards that will provide the lens for which classroom practices will be judged. Once agreement has been reached regarding standards they will then determine the content areas and grade levels that will become the focus. The Graduate School of Education will lead this initiative by facilitating the sharing of curriculum scopes and sequences and stimulating a dialogue that encourages the examination of a vertically aligned curriculum. Finally outstanding teachers will be nominated based upon the criteria and subject areas determined by the board and selected by a combination of site visits and interviews.

The combination of face-to-face and online technologies is appropriate to the task of negotiating complex problems especially ones that encourage collaboration and sharing resources. Within VES a separate area will be established that will include threaded discussions, file sharing and survey tools. This will allow the board to determine the criteria for best practice. Sub groups will be formed around specific disciplines and grade areas to determine content and to nominate teachers.

Participation in board activities by partnering districts will serve the dual function of planning and increasing the capacity of each districts professional development team. Not only will districts be a part of shaping materials but they will be examining their own curriculum, comparing it to other districts and amending it to suit future growth.

Integrating Vignettes Resource Center: The University of Massachusetts, Boston Graduate School of Education will take the lead in assisting districts to integrate the materials into their professional development activities. Several levels of participation will be developed to address the different needs of the partnering districts. Self directed districts might wish to receive minimal guidance while others would welcome a more active role by the university. The university will lead the discussions of the advisory board and help to determine the criteria for identifying best practice. They will also facilitate the sharing of curriculum and teaching and learning strategies that will assist districts in determining how Classroom VISITS will assist in their professional development.

Within VES a self guided resource center will be created to assist non-partnering districts who wish to share in the services. The center will include access to the steamed videos, a discussion area, evaluation rubrics that unpack the many layers build into each lesson, links to curriculum standards with VES and links to related articles and research that supports the key concepts.

Videotaping Materials:
The video examples of best practice are the foundation of this proposal and as such will be instructional by themselves. Their design will be structured so that viewers can glean many levels of understanding from different perspectives. Teaching and learning pedagogy, specific content and classroom management techniques will be embedded into the videos so that they act as springboards towards larger discussions. To help users navigate through the many layers a viewer's rubric will be designed that recommends areas of focus and provides suggested reading materials that can extend the conversations.

Participants:
Superintendent Paul Dakin, and the Revere Public Schools will administer the grant.
Robert Kelley E.d.M. will be the project coordinator.
Arthur Eisenkraft, Distinguished Professor of Curriculum and Instruction for the University of Massachusetts Boston will be the academic advisor.
John Jessoe, is the Director of Instructional Media at UMB.

3.2 Classroom VISITS will use VES as the platform for creating and publishing all materials for this grant. To supplement the face-to-face meetings of the advisory board the communication tools in VES will be used to continue discussions, share documents and build consensus. Similar uses of communications technology as an instrument for organizational change in the field of education have been met with outstanding results.[1]

Once the board has approved the disciplines, content areas and teachers to be videotaped and the vignettes have been shot and edited then VES will be used to publish the final projects. This will be accomplished by creating a separate area in VES for Classroom VISITS which will contain the links to the video files, a discussion area, links to standards and research and access to the support materials created. This seems an appropriate use of the technology because it will give every district in the state access to the materials. It will also extend the life of the project because VES will be around and offering services after the two year cycle of this grant. In addition, a growing number of districts are using VES as their professional development platform so accessing materials will be a seamless process that integrates directly into their existing platform.

3. Implementation Strategies, Activities, Professional Development, and Timeline –

3.3 Describe the professional development activities for this project:

[1] [1] Dede Chris, The Role of Emerging Technologies for Knowledge Mobilization, Dissemination and use in Education. Commissioned by the Office of Educational Research and Improvement, U.S. DOE

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1. *Establish an online community of practice site within VES:* Individual examples of excellence exists throughout the state yet sharing that expertise has been uneven within districts, let alone between districts. The creation of an online community of practice that allows members to examine, discuss and share ideas based upon a common goal will be facilitated within the Virtual Education Space, (VES).

   The formation of a community of practice requires care in the formation of groups and attention to the tasks that each group will address. A structure, within districts will be established that taps into the existing hierarchy and will be formed based upon job descriptions, content areas and grade levels. Each district will provide a moderator (usually the curriculum coordinator) who will be responsible for keeping the discussions active and productive. Training will be provided to help moderators understand the strengths and limitations of online technologies and they will be empowered to have the final say on the outcomes.

   Online communities alone can be effective but greater results often occur when online technologies are used to support face-to-face workshops. Classroom VISITS will use a hybrid approach that includes both face-to-face and online technologies. Prior to facilitating face-to-face discussions an online workspace with VES will be designed to allow for threaded discussions, file sharing and the ability to poll users on specific areas of concern. This online community of practice will be used between meetings to extend the dialogue and to allow for time to reflect upon some of the complex issues that surround the topics.

   The number of participants will include members from all 8 partner districts. Selection will include the curriculum coordinator, technology specialists and mathematics and science specialists. Total participants: 35

2. *Best Practices Roundtable*: In early October moderators (curriculum coordinators) from each of the partnering districts will meet to begin the process of defining best classroom practices. The Graduate College of Education at UMB will lead the activity and provide support material to focus the discussions on establishing criteria for evaluating classroom practices. The outcome will be to create an evaluation rubric that will be used to select candidates for videotaping. A secondary goal for the roundtable will be to form subject matter teams assembled to determine the areas of concentration for the videotaping. Total participants: 10 to 15 people.

3. *Determining areas of concentration online*: Oct – Dec, 2005; Curriculum coordinators will create teams in their district to review their mathematics and science curriculum to determine areas of concentration. These teams will use VES to begin the conversations on topics and grade levels. Areas of content focus will then be examined and an online poll will be produced to allow the partners to vote upon which subjects to document. Moderators will begin to identify candidates for outstanding classroom teachers who match the subject and grade level criteria established by the committee. The total number of participants will include the

curriculum coordinators, mathematics and science specialists and lead teachers from each district. Total participants: 45 people.

4. *Areas of Concentration Roundtable*: In early December, the UMB Graduate College of Education will lead the discussion on research into the areas of inquiry, formative assessment and maintaining fidelity to the curriculum. Representatives from each district will also present their proposals for the grade levels and content areas of concentration. The proposals will include the evaluation rubric, links to curriculum standards and sample lesson plans. The committee will review the classroom nominations and choose the finalists. Scheduling for best practices to be videotaped will begin in January. Total number of participants: 20 people.

5. *Videotaping Best Practices:* From January to June, five classrooms will be videotaped in the areas of mathematics and science. Each vignette will be approximately seven minutes in length and will be published on the University of Massachusetts video streaming server. Access to vignettes will be linked within VES.

6. *Classroom VISITS support material:* In early January the advisory board will meet to organize and review the support material submitted during the nomination process. Moderators from each subject area will create an action plan that will define the direction for the digital support center. Participants will then submit within VES the relevant documents, links to standards and research articles. Moderators will organize the material and have final say in the selection process. Total participants: 20 people

7. *Integrating Classroom VISITS into existing professional development*: In April the UMB Graduate College of Education will facilitate the discussion on how to integrate piloted materials into existing professional development. The first few vignettes will be reviewed and break out groups will conduct formative evaluations. Unless we ask this audience what they plan to do with the videos/ how they think they will implement the videos in their professional development, this is not the audience we want to evaluate the videos. We want to know what teachers who are going to be expected to learn from the video think of it, not these folks: The total number of participants will include the curriculum coordinators, mathematics and science specialists and lead teachers from each district. Total participants: 45 people.

8. *Classroom VISITS goes public:* In April the first completed vignettes and support materials will be published and presented at the Spring Enhancing Education Through Technology Conference. During the next three months new materials will be made available until all ten classroom examples are complete.

9. *Classroom VISITS Kick-Off:* Partnering districts will provide their first professional development activities using Classroom VISITS material. Each district will launch the project with a face-to-face meeting and discuss how the project will be managed locally. VES sign-ups will be completed and the criteria for awarding PDP points will be discussed. As part of local implementation a project wide discussion area within VES will be created to allow teachers to share ideas between districts.

Implementation in each of the partner districts may vary but at least 10 teachers will meet with content specialists at all eight districts. Total participants: 80 people

10. *District-wide implementation of Classroom VISITS:* During the summer of 2006 full access to materials will be made available to teachers and district personnel. Each district will determine how to integrate the materials into their professional development plans but because access is managed online through VES teachers can complete a sequence that will meet their district requirements at times they find convenient. Moderators in each district would monitor participation and award PDP points based upon their own criteria. Total participation for the districts to implement the remaining 4 vignettes would be approximately 40 people per district for a total of 320 people.

Follow-up Activities:
By the summer of 2006 five full units will be published and feedback will

3.3 Universal Design

Access to a high quality education is a commitment made by each of the University of Massachusetts campuses, and stated prominently on each website where potential students, faculty and staff catch their first glimpse of our campus culture. Now that classrooms are moving to "virtual space" maintaining our commitment to accessible high quality education is far more complex.

Web-based trainings are in the process of being developed at UMB to ensure that all faculty have the skills to reduce accessibility and usability barriers. A Course Review Committee has been proposed to evaluate each course beginning with the following criteria:

- Section 508 guidelines for overall accessibility
- W3C guidelines for the multimedia components of the online courses
- Instruction design practices for usability including clarity, consistency and systematic use of language, simplicity of navigation, formatting to convey meaning

In the design of Classroom VISITS the use of video overcomes many of the barriers that students with disabilities, especially sight impairments, must endure. All vignettes will include a separate written track embedded in the videos that will include descriptions such as settings, movement and specific activities for the sight impaired. Because the audio track conveys much of the intent of the lessons they will be transcribed and embedded into the videos to assist students with hearing impairments.

Access to all students regardless of race, gender, ethnicity, income, and geographical location is accomplished by publishing all materials on the state run Virtual Education Space (VES). Free access to all materials is one of the strengths of online technologies as it provides equal opportunities to all.

- a detailed description of follow-up activities, including the people who will be involved, the number of hours per activity, location(s) for the activities, and how these activities will help administrators and/or teachers implement content from the course in the classrooms, school, and district; and
- a description of how the project will provide at least 45 hours of high quality professional development activities for at least 15 to 20 participants.

3.4 Describe how the project will provide support to students, teachers, and/or administrators in *high-need* schools.

3.5 Provide a detailed timeline for the implementation of the project as stated. The timeline should identify the date and time span for each major activity, the key people responsible for the activity, and the participants in the activity.

3.6 Describe how the project will be maintained and/or scaled up at the end of the two years.

COMPONENT ll

4. *Partnership*

4.1 Classroom VISITS is a partnership between the University of Massachusetts Boston and many districts in the state.[2] Revere Public Schools will serve as the fiscal agent, through direct involvement with Superintendent Paul Dakin. (currently under discussion)

The partnerships for this grant began through relationships developed by the university's Superintendents' Academy formed in 2003 by a previous Technology Enhancement Competitive Grant. During the two year cycle of that grant the university had ample opportunity to listen to the needs of area school districts and to develop areas of common concerns. One topic that resonated with many districts was to examine new ways that higher education could assist in meeting the professional development needs of public schools. The university's track record established by the Superintendents' Academy demonstrated that new ideas and partnerships could succeed. In fact, many of the partnering districts have agreed to participate in this project based upon the good will created through the academy.

The partners will work together through the formation of the Advisory Planning Board that will be formed so that all parties will have a say in the creation of materials. This model has proven successful in the past and is consistent with the design philosophy established in prior projects. The University of Massachusetts, Boston is interested in helping school districts to solve real problems that are of consequence. To accomplish this we believe that our partners must have the shared responsibility of defining the agenda and recommending solutions.

5. *Evaluations and Accountability Plan*

Rigorous evaluations and accountability are essential for the successful implementation of the project. It is important that the project have an evaluation plan that serves both formative and summative functions. As a formative activity, the evaluation should provide timely, ongoing feedback to support project management, as well as document project implementation. Summative

[2] See attachment 1 for a list of partners

evaluation should be designed to measure progress toward overall attainment of the objectives and outcomes. Therefore, the project must have clear objectives with measures that directly assess the targets of each.

Each selected project must provide a mid-year report and a year-end report to the Massachusetts Department of Education regarding its progress in meeting the objectives and annual targets described in the evaluation plan.

It is highly recommended that each funded project allocate at least $5,000 each year for project evaluation.

5.1 *Evaluation questions that will be addressed:*

The overarching evaluation questions addressed in this project are:
How can videos demonstrating best practices be designed to support math and science teachers in their ongoing professional development?

How can districts improve their existing math and science teacher professional development by utilizing VISITS and supporting materials facilitated by the VES environment?

5.2 *Evaluation timeframes:*

(October-December 20005) Before videotaping begins, clearly defined goals and objective for each vignette will be defined and organized into a rubric.

(February-March 2006) Video editors will create 2 rough-cut vignettes (1 for math and 1 for science) based on the criteria identified in each rubric.

(March-April 2006) A formative evaluation will be conducted with the target audience to assess the rough-cut videos (see 5.3 for goals of evaluation). The results of this evaluation will be used to complete the creation of the rough-cut videos and to inform the creation of future videos.
The evaluator will design survey and focus group protocol. Subject recruitment will be a joint effort between evaluator, project coordinator, and student interns. Evaluator and/or trained student interns will conduct focus groups. Evaluator will collect and analyze data and submit findings in a report. Student interns will likely come from recommendations made by Dr. Ilona Holland, who teaches several evaluation courses at the Graduate School of Education, Harvard.

(May 2006 and May 2007) To assess how districts used VISITS and supporting materials, an evaluation will be conducted at the close of each academic year. Participants will include appropriate members of the advisory board and additional participants (see 5.3 for goals of evaluation). Feedback gathered from year 1 will be used in a formative manner and help identify program components that can be improved and components that are working well and should be emphasized for year 2. In Year 2, feedback will be used in a summative manner to report the overall strengths and weakness of the program.
The evaluator will design the survey instrument. With assistance, if necessary, the evaluator will utilize the survey tools found within the VES system to recruit

appropriate members of the advisory board and additional participants to complete the survey. Through the VES system, data will be collected electronically. Evaluator will analyze data and submit findings in a report.

5.3 Identify the specific activities, outcomes and measures that will respond to the evaluation questions.

Formative Evaluation of Rough-Cut videos

How can videos demonstrating best practices be designed to support math and science teachers in their ongoing professional development?

To address this overarching question, math and science teachers representing the target audience will be recruited to watch the science and math rough-cut vignettes. After viewing the vignettes, participants will be asked to respond to a survey and to participate in a focus group. The survey and focus group will assess:

- How effectively the video demonstrated the goals and objectives identified in the rubric
- What teachers learned from watching the video
- What aspects of the video teachers would likely implement in their classrooms
- How the videos could be improved
- What aspects of the video teachers found most useful and relevant
- What teachers liked most and least about the video
- How interesting teachers found the video

The results of this evaluation will be used to complete the creation of the final-cut and to inform the creation of future videos.

(Formative) Summative Evaluation of how VISITS and supporting materials are integrated in existing teacher professional development

How can districts improve their existing math and science teacher professional development by utilizing VISITS and supporting materials facilitated by the VES environment?

To address this overarching question, at the end of each academic year, appropriate members of the advisory board and additional participants, will complete a questionnaire designed to assess:

- How districts are utilized VISITS and supporting materials within their existing teacher professional development
- In what ways VISITS and supporting materials have improved existing teacher professional development
- In what ways VISITS and supporting materials could be more effective in providing support for existing teacher professional development
- How districts will utilize VISITS and supporting materials in the future (after the grant has expired)

- How easy/difficult it was to locate desired materials, including: navigation/ ease of use, accessibility of information (e.g. were curriculum connections, lesson, and vignettes grouped in an intuitive manner?)

Feedback gathered from year 1 will be used in a formative manner and help identify program components that can be improved and components that are working well and should be emphasized for year 2. In Year 2, feedback will be used in a summative manner to report the overall strengths and weakness of the program.

FY 2006

PART II-B PROJECT EXPENDITURES - DETAIL INFORMATION	**A. FUND CODE:**	170-B
B. APPLICANT AGENCY	**District four-digit code:**	
Applicant Agency: Marblehead Public Schools	**Address:**	
Contact Person: Ellen Minihan	**Zip Code:**	
Telephone: ( )	**E-mail address:**	

PLEASE PROVIDE THE INFORMATION REQUESTED ABOVE AND SUBMIT BOTH PAGES OF THE BUDGET DETAIL EVEN THOUGH THERE MAY BE NO LINE ITEM ENTRIES ON THE FIRST PAGE.

C. ASSIGNMENT THROUGH SCHEDULE A ☐

Check this box ONLY if this project will be using funds assigned by more than one agency. A completed Schedule A, with signatures and the amount of funds assigned by each participating agency, must be attached to this Budget Narrative.

D. STAFFING CATEGORIES	**E. # of Staff**	**F. FTE**	**G. MTRS***	**H. AMOUNT**	**I. TOTAL**
1. ADMINISTRATORS:					
SUPERVISOR/DIRECTOR					
PROJECT COORDINATOR					
STIPENDS					
SUB-TOTAL					0
2. INSTRUCTIONAL / PROFESSIONAL STAFF:					
STIPENDS					
SUB-TOTAL					0
3. SUPPORT STAFF:					
AIDES/PARAPROFESSIONALS					
SECRETARY/BOOKEEPER					
OTHER					
SUB-TOTAL					0

* Check the MTRS box if the identified employee(s) is/are a member of the MA Teachers' Retirement System. This requirement applies only to federally-funded grant programs.

4. FRINGE BENFITS:	**AMOUNT**	**LINE-ITEM SUB-TOTAL**
4-a MA TEACHERS' RETIREMENT SYSTEM (Federally-funded grants only)		
4-b OTHER FRINGE BENEFITS (Other retirement systems, health insurance, FICA)		
SUB-TOTAL		0

APPLICANT AGENCY:					FUND CODE:	
5. CONTRACTURAL SERVICES: Indicate the services to be provided and the rate to be paid per hour or per day.			**RATE**	**Hour/Day**	**AMOUNT**	**LINE ITEM SUB-TOTAL**
CONSULTANTS	Project Coordinator	$	50/hr x 8hrs	75 days	30,000	
SPECIALISTS	Video Producer	$	400/day	32.5 days	13,000	
INSTRUCTORS	8 District Curriculum Coordinators	$	400/day	7 days x 8	22,400	
SPEAKERS	UMass Faculty	$	100/hr	140 hours	14,000	
OTHER	Math & Science Specialists	$	200/day	8 days x 8	12,800	
SUBSTITUTES		$	75/day	6 days x 8	3,600	
INTERNS		$	12.50/hr	400 hrs	5,000	
EVALUATION		$	400/day	15 days	6,000	
SUB-TOTAL						106,800
6. SUPPLIES AND MATERIALS: Items costing less than $5,000 per unit or having a useful life of less than one year.						
TEXTBOOKS AND INSTRUCTIONAL MATERIALS						
INSTRUCTIONAL TECHNOLOGY VIDEOTAPING SERVICES					13,800	
NON-INSTRUCTIONAL SUPPLIES						
SUB-TOTAL						13,800
7. TRAVEL: Mileage, conference registration, hotel, and meals						
SUPERVISORY STAFF						
INSTRUCTIONAL STAFF					1,200	
OTHER (Meals)					1,000	
SUB-TOTAL						2,200
8. OTHER COSTS: Please indicate the amount requested in each category.						
Advertising				$		
Maintenance/Repairs				$		
Memberships/Subscriptions				$		
Printing/Reproduction				$		
Transportation of Students				$		
Telephone/Utilities				$		
Rental of Space				$		
Rental of Equipment				$		
SUB-TOTAL						0
9. INDIRECT COSTS		**Approved Rate:**		0.010		1,228
10. EQUIPMENT: Attach a list with a statement of need and cost of each item. Items costing $5,000 or more per unit and having a useful life of more than one year.						
INSTRUCTIONAL EQUIPMENT					972	
NON-INSTRUCTIONAL EQUIPMENT						
SUB-TOTAL						972

TOTAL FUNDS REQUESTED		125,000

Revised 2/2004

- Finance/Grants Recent Updates
- Accounting & Auditing
- Chapter 70 Program (Foundation Budget)
- Charter Schools
- Circuit Breaker
- DOE Budget
- Federal Renovation Program
- Grants: Information
- Nutrition Programs (School Lunch)
- Per Pupil Expenditure Reports
- School Building Issues
- School Choice
- School Finance Regulations
- Statistical Comparisons
- Transportation
- Vocational Education
- Key Contacts
- Links

Grants and Other Financial Assistance Programs

Grants for Schools: Getting Them and Using Them, A Procedural Manual

STANDARD APPLICATION FOR FY2006 PROGRAM GRANTS: INSTRUCTIONS

Revised - April 2004: [WORD] | [PDF]

General Instructions: Submission of proposals is to be made directly to the program unit that manages them, allowing for more rapid distribution to readers and review and approval of proposals.

Standard Contract Form and Application for Program Grants (Parts I and II)

Part I A-C: General Descriptor Information

A separate signature page signed by an authorized signatory will be needed for each program unit.

Required information includes:

- applicant agency name, address, and telephone number, four-digit district code;
- source and type of funding being applied for;
- beginning and end dates of the grant programs;
- the original signature of the authorized signatory; and
- date signed.

Part II: Project Expenditures

The Budget Detail Page (Part II) contains *applicant agency contact person* information, including:

- name of applicant agency, four-digit district code;
- fund code of grant program; and
- name, address, telephone number, and e-mail address of the applicant agency contact person.

Specific budgetary information structured in an object of expenditure or line item format and containing sufficient sub-line item information to comply with the relevant laws is required.

A grant application contains Parts I, II, and III, depending on the unique requirements of the grant program. In addition, a set of standardized schedules has been developed for the purpose of collecting supplemental information for certain programs and projects. Please

refer to the Request for Proposals to determine which, if any, schedules are required to be filed with the application for funding.

A federal Statement of Assurances certification document is required for most federal grants. This document is sent to superintendents/directors in a separate mailing and is to be returned to Grants Management.

Grant recipients are advised that:

- separate and auditable records must be maintained for each project;
- payrolls must be supported by time and attendance records;
- salaries and wages of employees chargeable to more than one grant program must be supported by time distribution records; and
- funds must be administered in compliance with relevant federal, state, and local laws, regulations, and policies.

PART I GENERAL DESCRIPTOR INFORMATION - SPECIFIC INSTRUCTIONS

A. Legal name and address of applicant agency.

B. Application for program funding: Indicate the amount of each proposal being applied for in the AMOUNT REQUESTED column and enter total amount requested.

C. The appropriate and responsible representative (i.e., the superintendent, collaborative director, or chief executive officer of an agency) must sign the certification, indicating his/her typed name, title, and the date signed. In the absence of the above named officials, an assistant superintendent or similar administrator, depending on the agency, may sign provided that he/she has been delegated this authority.

PART II PROJECT EXPENDITURES - DETAIL INFORMATION - SPECIFIC INSTRUCTIONS

The budgetary section of the Standard Application contains financial information to support project expenditures. Its purpose is to provide budgetary information, using a line item or object of expenditure format. Section II, the Budget Detail pages, requires detail information for the sublines of each project. All amounts on budget lines must be rounded to whole dollars; no cents allowed.

If the space provided on the detail page is insufficient to supply the requested information, attach additional sheets as necessary. However, please make every effort to use only the space provided. Many programs now require a budget narrative to accompany the Part II, Budget Detail pages.

There is sufficient detail in the budget format to cover most costs to be included in a project. However, all allowable items may not be listed (these can be included under line 8. *Other Costs*) and certain listed items may not be allowable under all grant programs. Refer to the Request for Proposals or contact the appropriate representative of the Department if you have any questions regarding particular costs.

Part II Project Expenditures - Budget Detail Pages

APPLICANT AGENCY AND STAFFING CATEGORY INFORMATION: A - I

Please provide all appropriate, requested information.

A. **Fund Code** - Request for Proposals Fund Code

B. **Applicant Agency Name** - Applicant agencies should provide the full, legal name of the school district or organization that is applying for grant funds. Names of individuals are not acceptable.

   District Code - Applicant agency code

   Contact Person - Name of person within the applicant agency that can be contacted regarding programmatic or budgetary questions. **A contact person should be available in July and August for grants scheduled to begin September 1**.

   Address - Applicant agency address, including Zip Code

   E-Mail Address - Applicant agency contact person's e-mail address

C. **Assignment Through Schedule A** - Check this box ONLY if this project will be using funds assigned by more than one agency. A completed Schedule A, with signatures and the amount of funds assigned by each participating agency, must be attached to this Budget Detail.

D. **Staffing Categories** - List the title of the staff employed under the project. In identifying the title, relate the title to any certification or licensing standards that may be required for the position, where possible.

E. **Number of Staff** - Indicate the actual number of staff (head count) for the positions listed under *Staffing Categories*.

F. **Full Time Equivalent (FTE)** - Summarize and indicate the time funded as a percentage of full time equivalency for the positions listed under *Staffing Categories*.

G. **MTRS* (Massachusetts Teachers' Retirement System)** - For positions listed under *Staffing Categories*, check all staff who are members of the Massachusetts Teachers' Retirement System (MTRS). (***Disregard this requirement for state-funded programs.***)

H. **Amount** - Indicate the amount budgeted for the positions listed under *Staffing Categories*.

I. **Total** - Indicate the subtotal of the amounts for each line item.

BUDGET LINES ITEMS 1-10

Please provide all appropriate, requested information.

LINE ITEMS:

1. **Administrators** - Supervise project staff and/or direct the project. Costs included under this line item must be directly attributable to the project and documented. Supervisory staff who may receive a stipend for grant activities which are over and above their regular responsibilities should be reflected in the *Stipend* box (unless the recipient agency has a policy of paying overtime for such activities).

2. **Instructional/Professional Staff** - Staff who provide direct educational/instructional services under the project. Instructional staff who may receive a stipend for grant activities that are over and above their regular responsibilities should be reflected in the *Stipend* box (unless the recipient agency has a policy of paying overtime for such activities).

3. **Support Staff** - Other staff who provide services necessary to support direct educational/instructional services under the project. Costs included under this line

item must be directly attributable to the project and documented.

4. **Fringe Benefits** - If fringe benefits are offered to project staff, these benefits must be granted under approved plans and be consistent with the applicant agency's standards for similar costs supported with other than project funds.

    a. **MA TEACHERS' RETIREMENT SYSTEM** (Federally-funded grants only) - Indicate the amount of Fringe Benefits allocable to the Massachusetts Teachers' Retirement System

    b. **OTHER FRINGE BENEFITS** - Other retirement systems, health insurance, FICA

5. **Contractural Services** - Services that cannot be provided by other full or part-time staff employed by the project. Generally, these services are for a short-term period and provide a specific and identifiable product or service. Recipients must adhere to relevant procurement standards when advertising for or soliciting potential service providers. Some grant programs may place a limit on expenditures for consultant services. Applicants should refer to the RFP or agency contact for specific guidance. Costs for substitutes should be reflected in this budget line. Stipends paid to regular salaried supervisory and instructional staff for activities outside their contracted working hours may also be listed here under OTHER (unless the recipient agency has a policy of paying overtime for such activities).

6. **Supplies and Materials** - Costs necessary to carry out the project. Supplies are defined as expendable personal property having a useful life of less than one year or an acquisition cost of less than $5,000 per unit.

7. **Travel** - Costs for employees on official business incident to the project. Costs must be consistent with the applicant agency's standards for similar activities supported with other than project funds.

8. **Other Costs:**

    Advertising - Costs for newspaper, magazine, radio, television, direct mail, trade paper, or other advertising provided that the costs are solely for: (a) recruitment of personnel required for the project, (b) solicitation of bids for procurement of goods or services required for the project.

    Maintenance and Repairs - Costs incurred for maintenance or repair of equipment purchased with project funds necessary to keep it in efficient operating condition.

    Memberships and Subscriptions - Costs of membership in civic, business, technical, and professional organizations provided that: (a) the benefit from the membership is related to the project, (b) the expenditure is for agency membership, (c) the cost of the membership is reasonably related to the value received, and (d) the expenditure is not for membership in an organization that devotes a substantial part of its activities to influencing legislation. Also include here the cost of software licenses.

    Printing and Reproduction - Costs incurred for printing and reproduction services necessary for project administration, including forms, reports, manuals, and informational literature.

    Transportation - Costs related to the project for pupil travel to and from school, between schools and in and around school buildings, and for appropriate field trips or site visits, etc.

Telephone/Utilities - Direct costs for telephone/telecommunications service and utility expenses that relate exclusively to the project.

Rental of Space/Equipment - Direct costs for rental of space/equipment that relate exclusively to the project, provided that the total cost does not exceed the rental costs for similar space or equipment supported with other than project funds.

9. **Indirect Costs** - For all school districts in Massachusetts, costs must be consistent with the rate established by the Department's Office of School Finance. For other than school systems, applicant agencies must comply with provisions of CFR 34 S.76.561. (Please note that indirect costs are not allowable under certain grant programs. If you have any questions regarding this issue, contact the appropriate representative of the Department.)

10. **Equipment** - Costs necessary to carry out the project. Grant Equipment is defined as tangible non-expendable personal property having a useful life of more than one year **and** an acquisition cost of $5,000 or more per unit.