

EVENTS & COST SHARE TRACKER (ECST) FAQ, TIPS, & COMMON ISSUES

All of the information in this FAQ is also contained in the manual. This is a summary of common questions.

- Some of the notes below only apply to certain GEAR UP schools so look for notes in brackets for [**Cohort Schools**] and [**Priority Schools**].
- The coordinator's site (<http://oregongearup.org/grant/invoices-cost-share>) has more information about invoices and cost share, including a [Cost Share Tutorial Slidecast](#).

ENTERING EVENTS

- **What events do we need to enter into the Events and Cost Share Tracker?**
Make sure to add all events and services that are related to GEAR UP or described in your plan if they have cost share and or/services associated with it. We want to make sure to capture all cost share and all services provided to students, parents, staff, and community members.
 - Examples to remember to include: GEAR UP Week, College Application Week, Texting seniors, GEAR UP classes/clubs, dual credit classes, summer camps or other summer events, GEAR UP student leadership events, GEAR UP statewide meetings, etc.
 - Remember to add all eligible cost share for those events, including volunteers/chaperones, transportation, food, and materials not covered by GEAR UP.
 - The items also cannot be covered by other federal funds.
 - You do not have to submit a form if you are simply making a purchase using GEAR UP funds if there is no other cost share or service associated with the purchase.
- **Can we enter events that are funded by a different grant?**
Yes, you can enter events that are funded by other grants (and indicate how many students/ educators/ parents attended) as long as they support the GEAR UP goals and do not come from federal funds.
- **Can we submit an event or cost share for things we have done in the past?**
Working on the premise that GEAR UP schools can count things as match only if they could have paid for it with GEAR UP funds (which follows the federal rules for GEAR UP spending), a program that was in place prior to the first grant year could not be counted unless it is enhanced/changed enough that it is not supplanting.
 - Example of Enhancing: A school might have had random students help other students with their math after school, not an organized program. Through GEAR UP, the school decides to add after-school tutoring staffed by a licensed teacher. Students can come in anytime they need help. In addition, teachers will tell parents about the tutoring opportunity during conferences each quarter.
 - Exception: [**Priority Schools**] can count programs, classes and events that were added due to GEAR UP, during the 6 years of the 2008-2014 GEAR UP grant.
- **What is the difference between events and non-event cost share?**
Events are used to track activities where students, parents, staff, or community members receive services. Events also have a place to track any associated cost share. Non-events are used for entering cost share that is **not** associated with an event where students, parents, staff or community members are receiving a service.

- **Do we have to enter events for different grant years in different sections on the website?**
No. All events, timesheets, etc. are listed together by date, not by grant year.
- **Can we enter activities into the ECST prior to the event? If so, what is recommend to keep track of the activities that are incomplete because we are waiting on information?**
You may create and save an event as PENDING that would include services and/or cost share and then save it as an active event once the activity has occurred and you have recorded all of the information. Similarly, you may enter a non-event cost share item as PENDING, and then save it as active once the materials or volunteer hours have been donated. Please note that an activity or non-event cost share item that is saved as pending is not counted towards your overall cost share when running reports.
 - **Note:** School liaisons will be entering all plan events in September (as pending events).
- **Is there an easy way to enter frequently reoccurring events such as classes that meet daily?**
You may want to work with your school liaison to determine the best way to track that event.
 - First, if you have an activity or group that meets weekly or daily, you will need to track the actual number of hours of service for each student.
 - **Note:** Don't create a single event for the entire class or entire term, because each student may have attended a different number of days, and thus received a different number of hours of service. We need the actual number of hours per student, not an average (not even an average based on the daily attendance rate).
 - Multi-day events are ONLY for consecutive day events where the same students attended the entire time, such as the Student Leadership Camp.
 - Option 1: The preferred method is to create a separate event for each day the class/tutoring is in session, using the "Add reoccurring events" (or "duplicate") feature to reduce data entry, and then enter the actual student attendance for the day, only including students who were in class that day.
 - To create a reoccurring event: Click "Add reoccurring event" on the left side of the main page or the data entry section of the menu bar at the top of the page. Click a tab to choose which type of recurring event you would like to create: once a month on the same weekday, once a month on the same date, or once a week on the same day of the week. Choose the start date and number of occurrences and click submit. Enter the header information, and exclude specific occurrences if needed. When you click submit, a separate event will be created for each date selected and saved to the pending folder. You can then view the pending events, add the missing information and students in attendance, uncheck the "Save event as pending" box at the bottom of the event, and click submit to save the event.
 - **NOTE:** *When creating reoccurring events, you are not able to add students; you will just be entering the information that applies to all dates. You will need to enter students for each individual event created.*
 - To create a duplicate event: Create an event for the first day of the class or activity. Once that is saved, you can view the list of events for your cluster, and click on the "Duplicate" link to the right of the event title each time you want to duplicate it. You can then add the date, hours of service, event category, R's, and students in attendance, and save the duplicated event.
 - Option 2: You may use an alternate method of creating several multi-day events per class, for the actual number of hours a student or group of students attended as long as you are sure that each student is recorded with the correct, actual hours that they attended the class. This entry

should be completed either monthly or each quarter at the longest. A separate “event” would be entered for each group of students that were served the same number of hours.

- For example: Let’s say you are entering service hours for Quarter 1 for your 7th grade GU class that meets 1st Period. First, you would request an official attendance printout of the students in the class including the number of days they were absent. Subtract the absences from the total days during that quarter. You would then group the students with “like” service hours together. Next, create an event with the title “Per. 1 GU Class – 28 hours” and record all of the students that were served for exactly 28 hours. Continue with another activity line for a different amount of time served until all students are accounted for.
- Option 3: If the class does not have a lot of students, you may also choose to create one event per term per student, with the exact number of hours that student attended.
 - **Example**: “Johnny Smith – College Application Writing – 19 hours”, “Sally Smith... 21 hours”, etc.
- **How do we track college courses taken by students while in high school?**

To enter a college class in the Events and Cost Share tracker, submit a separate multi-day event for each student, for each term. Indicate the total number of hours the student attended the college class for that term. The event title for each of these should include the student’s name and the term so that you can easily find the event if you need to (e.g. “Johnny Smith – Algebra 101 – Fall Term”). Fee waivers from colleges for students taking college classes can also be counted as match.
- **How do we record camps or trips that last several consecutive days?**

The best way to record consecutive days of service is by using the Multi-Day Event feature as long as all participants receive the same number of hours of service.
- **Is there ever a situation where we can enter just one event to record several events or activities that are related to a particular topic?**

No, please submit separate events for each individual activity. The only exception is when you are using the alternatives for entering frequently occurring events specifically outlined in the ECST Manual.

 - For example, if you are doing multiple activities related to the transition from MS to HS, you might enter several separate events:
 - June 3: Assembly with all MS students and select HS students
 - June 5: Tour of the HS
 - August 1-31: Cost share for staff planning time before school starts (outside of contract)
 - August 29: Parent/Family night for incoming freshmen (including staff cost share time)

SERVICES PROVIDED

- **When should we count someone as being served and when as cost share or match? Is there ever an instance when someone could be counted as both?**
 - **COST SHARE** (Individuals **INVOLVED**): The “Cost Share Info” section in the middle of the event entry page is used to show individuals who facilitated or volunteered at an event, and how many hours they contributed toward cost share.
 - Individuals **SERVED**: The “POST-EVENT REPORT: Numbers Served” section at the bottom of the event entry page is used to show the number of individuals who were served by the event. Being served means that they benefitted from (learned something from) the event whether they were the primary audience or not.
 - Make sure only people who received a benefit or learning from the event are counted. For staff or volunteers who attend events, consider whether they simply volunteered

their hours to plan or help at the event, received some kind of benefit/service/learning from the event as well.

- When tracking the number of parents, staff, and community members served by an event, **each person served should only be counted in one category** according to the specific capacity they are filling at the time. A staff member who is also a parent might be included in the staff category for a PD session or when volunteering at an event, or included as a parent at a parent night that they are not volunteering at.
 - People who attend an event or meeting might just be added to the cost share section, or just the section for individuals served, or both. **Someone could be listed in both places** if they volunteered during the event, and gained some knowledge about the topic being addressed. For example, if a teacher chaperones a college visit that is on a non-school day, they can be counted as being served because they would have learned from the things that the college student guide presented as well as being counted as match because they are volunteering their time.
- **Is there a way we can record the names of the parents in attendance on the ECST?**
If you want to track the names of parents attending events, please enter the parent names in the description box.
 - **How do we determine the length of time to record for an event?**
The number of hours and/or minutes that should be recorded should correspond with the amount of time served for the people recorded on the event.
 - **What is the difference between event length (hours of service) and number of volunteer hours?**
When entering events, the number of hours of service to students/staff/community members may be different from the number of hours volunteers/staff contribute toward cost share.
 - The event hours are used to calculate hours of service provided to the participants. For field trips and overnight events, hours of service provided should not include sleep time or travel time, unless you were doing preparation or debrief activities during the travel.
 - Chaperone/volunteer time CAN include travel time for match as well as any time supervising students, prepping for the event, etc. That is entered separately, in the center section labeled "Cost Share Info".
 - For more information on counting personnel time for cost share, please see the cost share tutorial: <https://www.slideshare.net/orgearup/cost-sharing-101-8665723>

ADDING STUDENTS TO EVENTS

- **Is there an easy way to add the same group of students to different events?**
If you have a group of students that regularly attends an event, such as tutoring, a class, or an academic team, you can create a student group to make it easier to add those students to an event. (View the student list, and then click "Manage Student Groups".)
- **Why is it important to be accurate when entering student names into events?**
Student names are required for all events in order to calculate an accurate number of students served and hours of service provided, and to run accurate reports that show which events particular students attended. **Having a sign in sheet for events may help track attendance.** You may wish to print out a list of all the students in the class, grade level or school, and check off those who attend.
- **In the case of a school wide event such as an assembly, can we choose "select all" since most of the students would be in attendance?**
No, you should only include the students who attended the event, as we need to track actual student attendance. Since having a sign in sheet will not work well in this case, we recommend getting a

printout of the students that were absent during that time for accuracy. When in the ECST, click SELECT ALL and then unclick those that were absent.

PROFESSIONAL DEVELOPMENT

- **If we consistently have PD every week, or if teachers attend multiple summer PD trainings can we record it as one event and add up all the hours?**

No, whenever possible, schools should **enter a separate event for each instance of staff PD training**, with the names staff who attended each training and the number of hours of PD for that particular training.

- **Can we count time at various GEAR UP meetings as service time? If so, how do we know how many hours to count?**

Staff time at the SUCCESS Retreat, Statewide Meetings, GEAR UP West conference, and other regional or national GEAR UP meetings should all be counted as PD and entered as events. The number of hours served may only include time actually participating in sessions, but the number of hours for cost share can include both session time and travel time (as long as the staff member's time is eligible to be counted as cost share). Contact your school liaison if you have questions about the number of hours.

GENERAL COST SHARE TIPS

- **Is there a tutorial to learn more about allowable cost share?**

Yes, here: <https://www.slideshare.net/orgearup/cost-sharing-101-8665723>

- **If we have reached our matching fund obligation, do we have to continue entering events into the ECST? Do we continue to send in our signed Cost Share Reports each month?**

Yes & Yes. Please continue to enter all events and cost share into the ECST and print, sign and submit the Cost Share Reports even if you have met your match obligations. Any extra cost share helps the grant as a whole to be in compliance for overall cost share. You do not need to send us copies of the backup documentation for cost share as long as you keep those on file at your school in the case of an audit.

- **What grant year will summer events count toward in terms of cost share totals for the year?**

The GEAR UP office uses the date range September 1- August 31 to tally cost share for each year. To gather the cost share amounts, we will always run a report from the ECST system.

- **When should we enter cost share using events, non-events, or timesheets?**

- **Events** are used to track services provided to students/staff/parents/community members. Enter any cost share (volunteer hours pre/post/during event, travel, materials) for the event on the event page.
 - Examples: College Visit, Staff Professional Development, GEAR UP Class, Parent Night.
- **Non-event cost share entries** are used for entering cost share for activities that do not involve direct service provision to students, staff, parents or community members.
 - Examples: a district/company Technology donation, a GEAR UP team planning meeting, state-funded grants.
- **Timesheets** are used to track eligible administrative time worked by staff, volunteers, teachers, etc. that supports GEAR UP, and is **not** associated with an event or non-event cost share item. It is important to note to use the Timesheets **OR** the Non-Event Cost Share section. If you put the same information in both places, it will be counted twice, which is against policy.
 - Examples: Volunteers who call parents, staff members working on GEAR UP reports.

- **How do we enter indirect costs?**

You do not need to enter the indirect rate – that is handled on the back end of the ECST. If your district has an approved indirect rate, it will populate the cost share section of the event and calculate indirect costs automatically. If you wish to add an indirect rate for the year, please contact your district office for a copy of the approved federal indirect rate agreement and send it to the GEAR UP office.

- **NOTE:** Your district/organization must have an agreement in place for the current fiscal year in order to claim indirect. You are allowed to claim your indirect rate, up to a maximum of 8%.

ALLOWABLE AND UNALLOWABLE COST SHARE

- **As a general rule, what things CANNOT be counted as Cost Share?**

- Anything that cannot be paid for with GEAR UP funds cannot be counted as cost share. Example: GEARUP funds cannot cover entertainment; therefore, costs associated with entertainment cannot be counted as match.
- If it comes from federal funds, it cannot be counted as match. Example: The TRIO program representative's time cannot be counted as match because TRIO is federally funded.
- The GEAR UP Office staff time cannot be counted as cost share.

- **What are some things that CAN be counted as Cost Share?**

- **[Priority]** You can count GEAR UP events that were begun under the GU2 grant as match, even if you are serving non-priority students. You will only be tracking attendance from the priority students, if any. Example: La Pine's math lab expenses paid by the district.
- You may count the amount for any discounts or waived fees for students attending GEAR UP related camps and events as cost share. You can enter that amount and a description under "materials and supplies" in the cost share section of the event. Please check with the camp to make sure GEAR UP is not already sponsoring the cost of students attending the camp; in that case, you would not be able to count the discount as match.

- **What are some things that MAY POSSIBLY be counted as Cost Share?**

- **Can we count substitute time, if someone covers a teacher's class?**
If you were doing a GEAR UP event during the school day, and someone covered your class, then yes, you can count the time of the person who covered your class as cost share, as long as the district covered the sub costs.
- If you have **students that tutor other students in an organized tutoring session**, both the tutors and tutees can be counted as receiving a service from the activity. The student tutor time can be counted as match, at the current volunteer rate, because the tutor is performing a duty that an adult could have been doing and that GEAR UP could have paid for. However, students acting as student aides in classes cannot count as match or a service.

- **Scholarships and fee waivers from colleges**

- **[Priority schools]** You can count **scholarships and fee waivers from colleges** for both rising college freshmen and sophomores as long as the money is not from a federal source and as long as they're NOT Oregon Opportunity Grant (OOG), Oregon Promise, or OSAC scholarships. (GEAR UP already counts the total OSAC scholarship amount for our students as match, and we cannot count it twice.)
- **[Cohort Schools]** You can count this match when your original 7th grade cohort are seniors.

- **How should GEAR UP coordinators count their time as match?**

- If the coordinator puts in time over and above the 20 hours per week, it can be used as match.

- **If the GEAR UP coordinator is also teaching a GU class** and their GEAR UP money is paying for their salary for the class period(s), they cannot count that time as match. If all of the following conditions are met, they can count their time during that class as match:
 - The time the GEAR UP Coordinator takes to coordinate GEAR UP is outside of their GEAR UP class time
 - The salary for the class period(s) is not paid out of GU funds
 - The class was started because of GEAR UP (even in the last grant cycle for priority schools)

Check with your school liaison about your school's specific situation.

VOLUNTEERS

Volunteer time is a great source of cost share.

- **Where do we find the current volunteer pay rate?**
<https://www.independentsector.org/resource/the-value-of-volunteer-time/>
 The rate is updated yearly. If the rate is not yet available for the current year, use the most recent rate.
Please use the federal volunteer rate.
 - Rate for past years:
 - 2010: \$21.36
 - 2011: \$21.79
 - 2012: \$22.14
 - 2013: \$22.55
 - 2014: \$23.07
 - 2015: \$23.56
 - 2016: \$24.14
- **Can we use the volunteer rate for anyone who volunteers?**
 Feel free to use the volunteer rate for anyone who volunteers who is not a school employee or who is not providing a specialized service, including students.
 - You will need to create an individual record for volunteers. Whenever possible, please include their name and title/position. For example, if you visit a college, college staff should have a different classification than "volunteer" even if you are using the volunteer rate.
 - Remember students (not including classroom aides) can be counted if they are volunteering in a capacity that an adult could have. Please ask your school liaison if you are unsure.
- **What do we enter for the benefit rate for volunteers?**
 For individuals entered into the ECST with the volunteer rate, ***please use 0 for the benefit percentage.***
- **How do you calculate the pay rate for a professional who is speaking or demonstrating at a career fair/college fair, or doing other volunteer work?**
 You must use the volunteer rate. *Only use the actual wage rate if the professional is actually acting in their professional capacity* regardless of whether they are missing work to be there.
 - **Example:** If a veterinarian is doing an exam on an animal in their office while a student is observing for a job shadow, you may count the time at their rate of pay and benefit percentage. If they are talking about what they do as a veterinarian at a career fair, you would use the volunteer rate.
- **If we have a large number of volunteers at an event, can we lump all of their hours together under a generic "volunteer" record for our school?**
 Yes, if you have an event, such as a career fair, with a large number of volunteers, you can lump their

hours together. Add a generic individual to your organization called “Volunteer group”, and list all the hours served by multiple people under that individual.

NOTE: You need to have a record on file of the actual names of each volunteer and how many hours they served. Whenever possible, please add individuals to the ECST and include their name and position.

- **Are we allowed to report volunteer cost share at other organizations’ college/career fairs?**

You are allowed to report the volunteers’ hours as cost share at college and career fairs held at organizations other than your school, with the following provisions:

- You can only report the hours that your students actually attend the event. If the college/career fair ran for 5 hours but you were only there for 2 hours you can only report 2 hours per volunteer for match.
- The college/career fair cannot be funded with federal money.
- In the unlikely event that there are overlapping claims to the presenters’ time as cost share, the GEAR UP office will contact you.

TROUBLESHOOTING

- **In the ECST, we can view the cost share amounts when we view or edit an event. However, the total cost share amount does not display in the list of events for our cluster, in the cost share column.**
Ask the GEAR UP office to enter your indirect rate for the year, or enter zero if you do not have an indirect rate. Cost share is not displayed in cases where the organization's indirect rate has not yet been established but was needed to calculate total cost share.
- **If you experience any other issues with the Events and Cost Share Tracker, please contact an Oregon GEAR UP staff member.**