Classified Grant Program Technical Assistance

September 12, 2023

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Commission on Teacher Credentialing

Professional Services Division

Agenda

- Updates for the 2023-24 Year

- Lessons Learned and Best Practices

  - General Tips

  - Program Enrollment

  - Program Progress

  - Funding

  - Audit/Budget Categories

  - Budget

  - Summary Data

  - Summary Narrative

- Questions/ Open Office Hours

Meeting Norms

1. Mute your microphone. Should you have a question, please use the **raise hand** feature and unmute microphone when you have been called on.

2. We will respond to questions periodically in the chat during the presentation but there will be time for questions at the end of the presentation.

3. Avoid multitasking during the meeting to ensure that you hear all information that is presented.

4. The presentation will be made available to grantees.

Updates for the 2023-24 Year

REVIEW UPDATES AND REMINDERS

2023-24 Annual Data Submission

- Submitting the required data will also release of the remaining 10% of the annual grant award and next fiscal year funds.
- Grantee must notify the grants team via email by the due date once data reports have been completed.
- Reminders will be sent.
- All submissions must be satisfactorily met.
- There is no extension.
  - Late/incomplete data impacts grant stewardship for the LEA.

Friday, July 12, 2024, by 5:00PM

Resources

- Updated [Classified Grants Webpage](#)
  - Office hours questions and answers
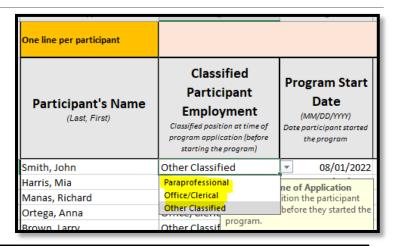 - Data guide and data direction
  - Demographic survey template

Resources for Funded Classified Grant Program Grantees

- Classified Reporting Data Directions
- Classified Grant Annual Data Guide
- Annual Data Spreadsheet Instructional Video
- Demographic Survey Template (Google account is needed)
- Office Hours Questions and Answers

Datasheet Updates

- Updated drop-down list for jobs

- Drop-down list for completion tab

- Demographic survey

Articulation Agreements

- Question 4 of the RFA : *Classified Grant Collaboration with Public and Private Institutions of Higher Education*
  - Partnership Agreement ≠ Articulation Agreement
  - Duration of the grant funding period, June 30, 2026
  - No template (local and collaborative decision)
  - Signed by authorized staff
  - Out-of-state institutions of higher education (IHEs) are **not** eligible
  - Eligible IHEs:
    - California Community College
    - California four-year public or not-for-profit IHE
    - Commission-approved preparation program offered by a regionally accredited LEA or IHE

LEA is responsible for establishing IHE partnership beforehand.
Grant funds do not support non-approved IHEs.

Adding New IHE Partners

- Fully complete the *Adding New IHE Form*
  - Section I – IHE Partner
  - Section II – Commission Approved Program
  - Signed Partership Agreement (Appendix G)
  - Signed copy of Articulation Agreement
  - Key Staff Table
    - Full time equivalent (FTE) of each position reflecting the amount of time they are contributing to the grant.

- Submit form and copy of the signed articulation agreement between the LEA and IHE partner(s) as an attachment to classifiedgrants@ctc.ca.gov.

- Once reviewed and approved, IHE will be reflected on datasheet dropdown.

Grant Stewardship

- Applicable to current and future state-funded grants administered by the Commission.

- Degree to which LEA applicants/IHE partners that previously received Commission-administered grants have:
  - repeatedly missed reporting deadlines
  - have not responded to Commission staff emails/calls
  - have not informed the Commission of program leadership changes
  - have used grant funds outside of the approved grant program, or otherwise exhibited poor stewardship of grant funds will be considered

- Past stewardship of state-funded grants administered by the Commission may affect whether or not the LEA will be awarded grant fund.

Lessons Learned and Best Practices

REVIEW 2022-23 DATA COLLECTION AND REPORTING

General Tips

- **<u>START DATA EARLY</u>**
  - Do not wait until Friday to address a tech issue

- Creating local copies
  - Do not submit local copies.
  - Be careful how items are pasted.

- Adding new IHE
  - No out of state IHEs (local funds must pay)
  - Submit forms and articulation agreement early

General Tips

- Review and complete each sheet

- Mandatory data collection and reporting requirement

- **LEA is responsible for informing the grants team about updating LEA contact**

  - Day-to-day contact, GAA authorizer, and fiscal agent

- Previous rounds of grant funding (2016/17- 2021) are **NOT** continuation of current rounds.

  - E.g., 2016 R1 v. 2021 **R1 (not R2*)**

Tech Tips

- Local copies- be careful how data is pasted

- Do not delete or move rows around.
  If a cell with a formula is deleted→

- Spreadsheet codes- if it doesn't arrive, check the SPAM/junk folder.

  - **Check with the LEA's IT team as filters may be updated throughout the year.**

  - The Commission does not send the codes or create Microsoft accounts.

- Stay logged in:

Program Enrollment

- Include **ACTIVE** participants that received grant funds

  - Enrolled with an Approved IHE
  - Working towards their BA and/or credential
  - Do not include participants that showed interest/thinking about it
  - ***Note- only attending an orientation or talking with an advisor is not active***.

- Minimum qualifications

  - AA/60 units

- Classified staff within the LEA (their position may have changed)
- Enrolled with an approved IHE partner
- Replacement Participants- only if all slots have been used

  - Make a note who they are replacing, $4,800 maximum for both slots
  - Funding tab will show a reminder in red under "Year # Replacement"

Participant Name (Names populate automatically from Program Enrollment tab)	Program Start Date MM/DD/YYYY (Data pulled automatically from Program Enrollment tab)	Final Completion or Exit Date MM/DD/YYYY (Data pulled automatically from Program Completion tab)	Year 1 Replacement (Data pulled automatically from Program Progress tab)	Participant Recruitment Activities	Collaboration with IHEs	Release Time	IHE Tuition, fees, books	Examinations/ Credential Fees	Living Stipend for Participant	Other Supports for Participants	Program Administration (<10% of grant funds)	Total
Ortega, Anna	08/01/2022		No	$5.00		$155.00	$3,000.00		$1,160.00		$480.00	$4,800.00
Brown, Larry	08/14/2022	10/30/2022	No	$5.00		$0.00	$1,000.00		$0.00		$105.00	$1,110.00
Zhan, Andy	10/30/2022		Yes	$0.00		$155.00	$2,020.00		$1,160.00		$350.00	$3,685.00

Data pulled automatically | YEAR 1

Program Progress

- Only include **ACTIVE** participants (recruited, enrolled, receiving grant funds, intends to continue program) receiving grant funds.

  - Enrolled with an Approved IHE
  - Working towards their BA and/or credential
  - *Note- only attending an orientation or talking with an advisor is not active*.

- Otherwise, mark them "Not Enrolled." **Do NOT delete the row**.

Participant Name (Names populate automatically from Program Enrollment tab)	Year 2 (2023-24)							
	Academic Year Select the academic year for the grant's 2nd year. Select "not enrolled" if participant was not enrolled this year.	**Replacement?** Are they entering the program in Year 2 as a replacement participant?	**Degree Progress** Did they make progress towards their BA? N/A if already has BA.	**Degree Completed** Did they complete their BA? N/A if already has BA.	**Preliminary Credential Progress** Did they make progress towards their preliminary credential?	**Preliminary Credential Completed** Did they earn their preliminary credential?	**Employed Next Academic Year?** If preliminary credential is completed, are they employed as a teacher the next academic year?	**Early Exit** Did participant exit early/before completing program?
Ortega, Anna	2023-24	No	Yes	Yes	No	No	N/A-No Credential	No
Brown, Larry	Not Enrolled							
Zhan, Andy	2023-24	No	Yes	Yes	No	No	N/A-No Credential	No

	Year 2 (2023-24)								
Participant Name *(Names populate automatically from Program Enrollment tab)*	**Academic Year** *Select the academic year for the grant's 2nd year. Select "not enrolled" if participant was not enrolled this year.*	**Replacement?** *Are they entering the program in Year 2 as a replacement participant?*	**Degree Progress** *Did they make progress towards their BA? N/A if already has BA.*	**Degree Completed** *Did they complete their BA? N/A if already has BA.*	**Preliminary Credential Progress** *Did they make progress towards their preliminary credential?*	**Preliminary Credential Completed** *Did they earn their preliminary credential?*	**Employed Next Academic Year?** *If preliminary credential is completed, are they employed as a teacher the next academic year?*	**Early Exit** *Did participant exit early/before completing program?*	**Notes**
Smith, John	2023-24	No	Yes	Yes	No	No	N/A-No Credential	No	
Harris, Mia	2023-24	No	N/A	N/A	Yes	Yes	Yes	No	
Manas, Richard	2023-24	No	N/A	N/A	Yes	Yes	No	No	
Ortega, Anna	2023-24	No	Yes	Yes	No	No	N/A-No Credential	No	
Brown, Larry	Not Enrolled								
Zhan, Andy	2023-24	No	Yes	Yes	No	No	N/A-No Credential	No	

Not Enrolled: Do not include any additional data.

▪This also serves as a reminder on the "Funding" tab under "Year # Replacement" (blank), that no funds should be allocated to that participant for that year.

	Data pulled automatically			YEAR 2									Year 2	
Participant Name *(Names populate automatically from Program Enrollment tab)*	**Program Start Date** MM/DD/YYYY *(Data pulled automatically from Program Enrollment tab)*	**Final Completion or Exit Date** MM/DD/YYYY *(Data pulled automatically from Program Completion tab)*	**Year 2 Replacement** *(Data pulled automatically from Program Progress tab)*	**Participant Recruitment Activities**	**Collaboration with IHEs**	**Release Time**	**IHE Tuition, fees, books**	**Examinations/ Credential Fees**	**Living Stipend for Participant**	**Other Supports for Participants**	**Program Administration (<10% of grant funds)**	**Total**	**Admin Costs < 10%?**	**Year Total < $4,800 per part.**
Smith, John	08/01/2022		No			$155.00	$3,000.00		$1,165.00		$480.00	$4,800.00	Yes	Yes
Harris, Mia	08/01/2022	06/12/2024	No			$155.00	$3,000.00		$1,165.00		$480.00	$4,800.00	Yes	Yes
Manas, Richard	08/01/2022	06/12/2024	No			$155.00	$3,000.00		$1,165.00		$480.00	$4,800.00	Yes	Yes
Ortega, Anna	08/01/2022		No			$155.00	$3,000.00		$1,165.00		$480.00	$4,800.00	Yes	Yes
Brown, Larry	08/14/2022	10/30/2022										$0.00	Yes	Yes
Zhan, Andy	10/30/2022		No			$155.00	$3,000.00		$1,165.00		$480.00	$4,800.00	Yes	Yes

Audit

- **Per the Grant Award Agreement, grantees may be audited by the state through June 30, 2029, and will need to verify that the project's expenditures were properly documented.**
  - Grantees will be contacted at least 30 days in advance of an audit.
  - Includes all budget categories, except program administration
  - Review non-allowable use of grant funds list ([RFA Page 5](#), next slide)

"Grantee agrees to maintain satisfactory financial accounts, documents, and records for the Project and to make them available to the State for auditing at reasonable times. Grantee also agrees to retain such financial accounts, documents and records for three years following Project termination or completion."

Non-Allowable Use of Grant Funds

- Non-Allowable Activities and Use of Funds Grant funds may not be used to fund any of the following activities (RFA Page 5):
  - Reimbursing expenditures incurred by participants prior to the program's grant funding.
  - Supplanting of existing funding and efforts, including any costs associated with operating the LEA.
  - Acquiring equipment for administrative or personal use.
  - Purchasing technology (e.g., cell phones, laptops, cameras, etc.)
  - Purchasing instructional supplies
  - Acquiring furniture (e.g., bookcases, chairs, desks, file cabinets, tables), unless an integral part of an equipment workstation or to provide reasonable accommodations to students with disabilities.

- Purchasing food services, refreshments, banquets, meals
- Purchasing, renting, remodeling or construction of a space.
- Purchasing memberships in professional organizations.
- Purchasing promotional favors, such as bumper stickers, pencils, pens, or T-shirts.
- Subscribing to journals or magazines.
- Traveling to professional conferences, unless it is demonstrated that attending significant advances the grant program (must be Commission approved).
- Traveling outside the United States or any of California's banned states.

Budget Categories

Participant Recruitment Activities

- Existing local need as stated in the RFA and LEA's grant application.
- Only claim recruitment activities for recruitment and enrolled participants in the program.
- Enrolled participants cannot be recruited twice.
- Review non-allowable use of grant funds list (RFA Page 5)

Collaboration with IHEs

- Collaborative activities with IHEs providing coursework and other services to participants.
  - Not tuition
  - Mentor and advising
  - Professional development through the IHE
  - Exam prep

Budget Categories (Cont.)

Release Time
- Participants will be supported with release time as they pursue their teaching credential.
- May cover substitute.

IHE Tuition, Fees, and Books
- Participants must be enrolled with an <u>approved IHE</u> partner to receive ANY grant funds.
- Grant funds do not supplant financial aids.

Examination and Credential Fees
- Exam prep fees
- Examination fees (e.g., CBEST, CSET, RICA)
- Exam fee waivers: Fee waivers for applicable examinations and assessments will be available through June 30, 2024, or until all $24,000,000 has been disbursed for the 2023-2024 year.
  - Examinees may need to pay up front and be reimbursed until new contracts are in place, but the funds were allocated, and reimbursements will be automatic.

Budget Categories- (Cont.)

Living Stipends for Participants
- Locally defined
- Documentation is recommended (e.g., childcare, transportation, utilities, lost wages, personal expenses, etc.).
- Not a blank stipend check

Other Support Services for Participants
- Only applicable to enrolled participants in the program.
- As defined in the LEA's grant application.
- Does not include program administration or recruitment.

Program Administration
- Only applicable to LEAs with approved program administration category.
- Ten percent cap on program administration.
- No documentation necessary.
- **2023-24 and moving forward- costs may only be claimed for ACTIVE participants**

Budget

- Grant funds are generated per participant in the LEA grant program.

- LEA grantees will disburse and track grant funds per actively enrolled participant.

- Grants funds may not be expended on projected participants, potential participants, or as a lump sum per budget category.

- **MOUs with IHEs- grant reimburses per participant, not per budget category**
  - $4,800 maximum per participant, per year. No exceptions.

Budget (Cont.)

- DO NOT EDIT, just review.

- Notes will be added for budget changes.

- Budget changes are for the total budget, not per participant.

- Carryover and pooling of unused funds is not allowed. The budget disbursement for any fiscal year of the program will be adjusted to account for funds that have not been spent or encumbered in a prior fiscal year.

- Budget Revisions: Movement across approved budget categories is allowed under 10% of the total grant award budget (*not expenditures*). Anything over 10% needs Commission approval.

	Year 1: Budget	Year 1: Expended	Year 2: Budget	Year 2: Expended	Year 3: Budget	Year 3: Expended	Year 4: Budget	Year 4: Expended	Notes
Budget									
Year	2022-23	2022-23	2023-24	2023-24	2024-25	2024-25	2025-26	2025-26	
Total Participants	5	5	5	5	5	0	5	0	
Grant Award (Total)	$24,000.00	$23,995.00	$24,000.00	$24,000.00	$24,000.00	$0.00	$24,000.00	$0.00	
Approved Grant Categories									
Participant Recruitment Activities (not included in Program Administration and/or Release Time)	$25.00	$25.00	$25.00	$0.00	$25.00	$0.00	$25.00	$0.00	5/2/23 Budget change
Collaboration Activities with IHEs (not included in Program Administration and/or Release Time)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Release Time	$775.00	$775.00	$775.00	$775.00	$775.00	$0.00	$775.00	$0.00	
IHE Tuition, Fees, Books	$15,000.00	$15,020.00	$15,000.00	$15,000.00	$15,000.00	$0.00	$15,000.00	$0.00	
Examination/ Credential Fees	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Living Stipends for Participants	$5,800.00	$5,800.00	$5,800.00	$5,825.00	$5,800.00	$0.00	$5,800.00	$0.00	
Other Support Services for Participants	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Program Administration (less than 10%)	$2,400.00	$2,375.00	$2,400.00	$2,400.00	$2,400.00	$0.00	$2,400.00	$0.00	
Budget Analysis									
Total	$24,000.00	$23,995.00	$24,000.00	$24,000.00	$24,000.00	$0.00	$24,000.00	$0.00	
Program Admin costs are less than 10% of budget?	Yes	Yes	Yes	Yes	Yes	#DIV/0!	Yes	#DIV/0!	
Difference from Grant Award		$5.00		$0.00		$24,000.00		$24,000.00	
Budget Revisions under 10%?		0.09%		0.10%		50.00%		50.00%	
Difference from 90%/10% disbursement				-$5.00		$24,005.00		-$5.00	
Used all awarded funds?		No		Yes		No		No	
Funding									
90% (includes difference from previous year)	$21,600.00		$21,595.50		$21,604.50		-$4.50		
10% (includes difference from previous year)	$2,400.00		$2,399.50		$2,400.50		-$0.50		

Summary Data

- DO NOT EDIT, just review.

- Deleted rows in other tabs affect these formulas and errors will appear.

Question	Summary Data	Year 1 2022-23 #	%	Year 2 2023-24 #	%	Year 3 2024-25 #	%	Year 4 2025-26 #	%	Program Summary Total #	%
	Directions: *If applicable, only enter data for question 1e (the cell(s) will highlight). Otherwise, the remaining data automatically populates.*										
1	**Participant Summary**										
a	Number of participant allocated slots (approved from grant application).	5	25%	5	25%	5	25%	5	25%	20	
b	Number of participants enrolled in the program.	4	80%	4	80%	0	0%	0	0%	5	25%
c	Number of replacement participants, if any.	1	25%	0	0%	0	#DIV/0!	0	#DIV/0!	1	20%
d	Actual number of participants enrolled in the program, including participants added as replacement, if any. If 1a and 1d do not match, explain below.	5	83%	4	67%	0	0%	0	0%	6	
e	Narrative (If applicable, once participant data entry is done, as the cells will automatically highlight if 1a and 1d do not match. If so, please explain why.)										
2	**Academic standing of the participants at the end of the academic year.**										
a	Number of participants that earned their BA.	0	0%	2	50%	0	#DIV/0!	0	#DIV/0!	2	33%
b	Number of participants who did NOT make progress towards their BA.	1	20%	0	0%	0	#DIV/0!	0	#DIV/0!	1	17%
c	Number of participants who did NOT make progress towards their preliminary credential.	3	60%	2	50%	0	#DIV/0!	0	#DIV/0!	5	83%
3	**Completion Data**										
a	The number of participants who have earned a preliminary teaching credential.	0	0%	2	50%	0	#DIV/0!	0	#DIV/0!	2	33%
b	The number of participants who have earned a preliminary teaching credential and are now serving as a teacher or have been offered a teaching position for the following academic year within the LEA.	0	0%	1	25%	0	#DIV/0!	0	#DIV/0!	1	17%
c	The number of participants who have earned a preliminary teaching credential and were hired within the LEA to meet the LEA's teacher shortage needs.	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	1	17%
d	The number of participants who have earned a preliminary teaching credential and were hired within the LEA and are teaching at an LEA with a high unduplicated pupil count (>50%).	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
e	The number of participants that have exited early.	1	20%	0	0%	0	#DIV/0!	0	#DIV/0!	1	17%
f	For the final year of the grant, the number of participants that didn't earn a credential, but are still *in progress* (didn't exit).									0	0%

Summary Narrative

- Reports to the state legislature include "Summary Narrative" responses.

- This is reviewed and impacts future funding, including *current* grant funds.

- Please provide more than one sentence.

- N/A is not a response. Please describe any challenges the LEA experienced.

Directions: Annually, complete questions 1-6.	Summary Narrative Year 1 (2022-23)	Summary Narrative Year 2 (2023-24)
1 Please explain the degree to which the program is meeting the grantee's teacher shortage needs.		
2 Describe your program's successes.		
3 What made it successful?	Year 1 will be hidden for Round 3 grantees.	Everyone completes Year 2 2023-24.
4 Describe your program's challenges.		
5 Describe the impact of your collaboration with your IHE partner(s) and/or community college partner(s).		
6 Please share any lessons learned that may support future grantees.		

Office Hours

- Questions- classifiedgrants@ctc.ca.gov

- December Agenda Item

- Reminder- Next sessions:

Second Tuesdays, 10:00AM – 12:00PM	Zoom Link, Meeting ID: 894 1791 3477
September 12, 2023	February 13, 2024
October 10, 2023	March 12, 2024
November 14, 2023	April 9, 2024
December 12, 2023	May 14, 2024
January 9, 2024	June 11, 2024

Questions

OPEN OFFICE HOURS SESSION