**NEA Great Public Schools (GPS) Fund:**

**Planning Grant Preparation & Support Packet**



*Last Updated: April 2022*

**Planning Grant Applications are Due by September 15TH (ANNUALLY)**

1. **General Information Pages 2-6**
2. **Outline of a Planning Grant Application Pages 7-23**

**(Questions, Examples, and Tips)**

**NEA Center for Professional Excellence & Student Learning**

**Section I: General Information**

**Preparation & Support Packet**. The NEA Center for Professional Excellence & Student Learning grants team is proud to provide this Preparation & Support Packet to aid you with information about our NEA Planning Grant (“Planning Grant”) process as your Affiliate considers submitting a Planning Grant application. Please note this packet is NOT the actual way to apply for the Planning Grant. Instead, this is a packet that will help you with the process. The application is online at NEA.org [here](http://www.nea.org/grants/76225.htm).

**Background**. In general, the Planning Grant application, due by September 15th each year, is an abbreviated version of the full NEA GPS Fund (“GPS Fund”) application. If awarded a Planning Grant, your Affiliate will receive funding (up to $10,000) and other technical assistance from NEA to plan, workshop, and flesh out your proposal in anticipation of submitting your full GPS Fund application by the February 1st deadline annually. It is literally, a planning grant to fund meetings of a team to strategically plan for and submit the GPS Fund grant.

Only those Affiliates awarded Planning Grants are eligible to continue developing their proposal and submit a full GPS Fund application. Please note, award of a Planning Grant does not guarantee award of a GPS Fund grant.

**What are the deadlines?**

This is a two-stage process.

Stage 1 – Due by September 15: Planning Grant Application (open to all NEA Affiliates).

Stage 2 – Due by February 1: GPS Fund Application (Planning Grant awardees only).

**What are the guidelines for applying?**

NEA is providing State and Local Affiliates the opportunity to apply for a Planning Grant pursuant to the GPS Fund Grant Guidelines ([link](https://www.nea.org/sites/default/files/2020-07/NEA%20GPS%20FUND%20GRANT%20GUIDELINES%202020%20-%20Approved%20Changes_CLEAN.pdf)) set forth by the NEA Board of Directors and GPS Fund Oversight Committee.

**What are the Planning Grant and GPS Fund Grant timelines?**

The overall Planning Grant and GPS Fund application process steps annually are:

September 15th Planning Grant Applications due

October 15th Planning Grant Awards announced (up to $10,000)

Oct. 15th – Jan. 31st Planning Grant Awardees prepare/plan/workshop their full GPS Fund applications - prepared with technical assistance from NEA

February 1st GPS Fund Applications due

April 1st GPS Fund Grant Awards announced

**When is the Planning Grant due?**

The application deadline for the Planning Grant is September 15th by 11:59 PM in your local time zone. Please do not submit late!

**What is the purpose of the Planning Grant?**

The purpose of the Planning Grant is to provide additional support and technical assistance to Affiliates as they prepare to submit their full GPS Fund Grant applications.

**What is included in the Planning Grant application**?

The Planning Grant consists of an abbreviated version of the full GPS Fund Grant application, with Scope of Work and Budget attachments. Additionally, it will require budget detail for how you would spend up to $10,000 in Planning Grant funds.

* Planning Grant application
* Budget for Planning Grant (up to $10,000)
* Proposed GPS Fund Scope of Work (required attachment)
* Proposed GPS Fund Budget for each year of the GPS Fund Grant, as anticipated (required attachment)

**Who may apply for a Planning Grant?**

State Affiliates, Local Affiliates, or joint applications of State and Local Affiliates may apply. This is an Affiliate grant program (not meant for individuals or other third-party organizations).

**How much may we request in the Planning Grant?**

The maximum amount available for the Planning Grant is $10,000.

**What are some examples of how affiliates utilize the Planning Grant (up to $10,000)?**

Time is the key thing many planning grantees have paid for with the Planning Grant. The purpose is to make the GPS Fund grant a longer term, needed strategy, not a pet project. The key is to use the funds as a foundation to develop the program and complete the writing of the GPS Fund grant application.

Some examples are listed below for the (up to) $10,000:

* Pay for subs, or due to the lack of substitute availability, pay for planning/meeting time of member leaders to help plan the larger GPS Fund Grant.
* Pay members for their time in professional learning committees to plan the large grant, split up research, or networking with partners for the GPS Fund grant, and network with appropriate/interested groups like various committees, caucuses, and/or business/community potential partners.
* For those focusing on early career educators, some affiliates have developed or utilized an existing committee of early career leaders to aid in developing the plan that would be paid for by the GPS Fund grant.
* Planning Grant funds are used to focus on the development of a strategic plan, the resources have been used to bring together key stakeholders and a consultant/facilitator for the strategic plan. Those engaged in the strategic plan then have assignments to gather partners, recruit professional learning curriculum developers and workshop leaders, as well as meeting with potential community/school partners.
* Affiliate sometimes pay for the assistance of a grant writer (planning is still done extensively by members, staff, and partners).
* Affiliates may travel to a site with an existing GPS Fund grant (or meet virtually) to learn from them and perhaps replicate some of the program implemented.
* Member leaders for the grant may attend a professional learning program to replicate. This may be a NEA, affiliate, or other professional learning experience.

**Who must sign-off on the Planning Grant?**

The Executive Director or President of the Affiliate MUST sign-off. Their electronic signature acknowledges the application is in alignment with the Affiliate and is an Affiliate priority since the Affiliate is the recipient of any grant funding.

**Is a Planning Grant award required to be eligible to submit a full GPS Fund Grant application?**

Yes

**If awarded a Planning Grant, what is included with Technical Assistance as we complete the full GPS Fund application?**

One of the NEA grant staff will work with you to make sure you understand the grant process and guidelines. They will review such things as your title, goal, outcomes, scope of work, and budget. The staff will guide you and will track their time spent with you, to document the services provided.

**How does our Affiliate submit a Planning Grant application?**

Due Date. Planning Grant applications are due by 11:59 PM Local Time on September 15th.

Website. All Planning Grant applications (and attachments) must be submitted electronically through this website [link](http://www.nea.org/grants/76225.htm) on NEA.org.

Important Attachments. The following Word document (Scope of Work) and Excel file (Budget Worksheet) will allow you to create a substantial portion of the Planning Grant application offline, then attach it to the online application where requested. **BOTH OF THESE DOCUMENTS ARE REQUIRED TO BE ATTACHED AND SUBMITTED AS PART OF THE ONLINE PLANNING GRANT APPLICATION.** The application, with all attachments, MUST be submitted via the above application link by the listed due date.

* [Link](https://www.nea.org/sites/default/files/2020-07/GPS%20Fund%20Scope%20of%20Work.docx) to **GPS Fund** **Scope of Work** template (available to download, Word document).
* [Link](https://www.nea.org/sites/default/files/2020-07/GPS%20Fund%20Budget%20Worksheet.xlsx) to **GPS Fund Budget Worksheet** (available to download, Excel document).

**Why must I join the “NEA Grants 4 Great Public Schools” edCommunities group?**

Examples of core aspects of the Planning Grant are included in this packet. Additionally, you will find examples at [www.mynea360.org](http://www.mynea360.org/) in the group “NEA Grants 4 Great Public Schools”. Webinars on grant writing are available in the resources of that same group. The purpose of the edCommunities group is to share information, successes, curriculum, approaches, etc. Consider it a Professional Learning Community for grants. Announcements from the GPS Fund staff are made through this medium. Additionally, it can be very helpful to connect with others who have (or had) a NEA Grant.

**What is expected of grantees who receive (i.e., are awarded) a Planning Grant?**

The expectations are:

* Attend two NEA grant, required webinars (or view the recordings).
* Join the *NEA Grants 4 Great Public Schools* on [www.mynea360.org](http://www.mynea360.org) and post your plans and progress.
* Reach out to your NEA Grant contact to set a meeting ASAP after notification you received the Planning Grant.
* Follow the plan you have for expending the Planning Grant funds and completing activities.
* Reach out to potential or identified partners to include them in the planning.
* Communicate regularly with your NEA grant contact for technical assistance.
* Track expenditures and activities to submit a final report.
* Use the time given to work with others in your affiliate, reach out to NEA content experts, and develop partnerships to submit a quality GPS Fund grant application.
* Work with the financial lead, NEA360 or data lead, communications lead, and affiliate leaders on the GPS Fund grant to complete all sections. Grants involve more than just the professional learning division of an affiliate, and all should be engaged and supportive of any application.
* Work on the GPS Fund Grant application consistently each month. THERE IS A SAVE OPTION AVAILABLE, SO YOU CAN COMPLETE YOUR ONLINE APPLICATION IN STAGES.
* DO NOT wait until the last few weeks to complete the application. It shows when you do.
* Apply for a GPS Fund Grant with all items completed, on time!
* Submit a final report when requested, on activities, outcomes, and expenditures for the Planning Grant – this will help us (NEA) understand how Planning Grants are being used and can provide valuable feedback for following rounds.

**NEA Center for Professional Excellence & Student Learning**

**Section II: Outline of Planning Grant Application**

This is a copy of the questions asked in the Planning Grant application for your advanced review.

1. **AFFILIATE(S) INFORMATION**
	1. Affiliate(s) Information & Key Contacts
	2. Planning Grant Funding Request and Rationale (up to $10,000)
	3. Summary of GPS Fund Grant Request (up to $250,000 per year for 3 years) and Affiliate Support Note
2. **GPS FUND PROPOSAL INFORMATION – Planning Grant Stage**
	1. Title
	2. Brief Project Description
	3. Priority Focus
	4. Statement of Need
	5. Draft GPS Fund Scope of Work \*
	6. Draft GPS Fund Budget Worksheet (up to $750,000 over 3 years) \*
	7. Anticipated Partnerships
3. **DATA TRACKING**

*\* Items that will need to be uploaded as attachments to the online Planning Grant application, where requested.*

**I. AFFILIATE(S) INFORMATION**

This section of the Planning Grant includes these segments:

* 1. Affiliate(s) Information and Key Contacts
	2. Planning Grant Funding Request and Rationale (up to $10,000)
	3. Summary of GPS Fund Grant Request (up to $750,000) and Affiliate Support

**A. Affiliate(s) Information and Key Contacts**

1. Applicant
	1. Affiliate Name (lead Affiliate if application consists of multiple NEA Affiliates)
	2. Street address
	3. City/Province
	4. State
	5. Country
	6. Postal Code
	7. Affiliate Type (State or Local)
	8. Membership Density (Rural, Suburban, Urban, All)
	9. Are you a Local Option UniServ (Yes, No, N/A)
	10. Number of Affiliate Members
	11. Number of Potential Members (non-members in your footprint)
2. Affiliate Leadership Contact (President or Executive Director)
	1. Name
	2. Title/Position
	3. Street Address
	4. City/Province
	5. State
	6. Country
	7. Postal Code
	8. Email
	9. Office Phone
	10. Office Fax
	11. Mobile Phone
3. Affiliate Partner(s), if applicable. Detail the role of other NEA Affiliates. Please note that this is only for partners that will receive grant funding directly as a benefit of their partnership, *i.e.,* two Affiliates sharing the resources of the grant and planning together. Note the main applicant is responsible for collecting and combining all progress reports, including budget expenditures. Non-affiliate partners, if any, are requested later.

|  |  |  |  |
| --- | --- | --- | --- |
| **Affiliate** **Name** | **Type** **(State or Local Affiliate)** | **Contact Name** | **Contact** **Email** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. Primary Grant Contact. List the person who will have the most direct contact with the work of the grant and be responsible for submitting the progress reports.
	1. Name
	2. Title/Position
	3. Street Address
	4. City/Province
	5. State
	6. Country
	7. Postal Code
	8. Email
	9. Office Phone
	10. Office Fax
	11. Mobile Phone

**B. Planning Grant Funding Request and Rationale**

Directions: You may request funding of up to $10,000 for a Planning Grant.

Include any needs for planning that fit into the four categories identified below (which mirror those found in the GPS Fund Budget Worksheet:

1. **Personnel/Staffing** – stipends, substitutes, etc.
2. **Travel** – flights, lodging, food, mileage, etc.
3. **Consultants/Vendors** – contracted work with a third party.
4. **Other Direct Expenses** – meeting space, postage, printing, supplies, etc.

Any expenses for planning that you may incur as you prepare for the full GPS Fund Grant application (*e.g.,* substitutes, meeting space, travel, etc.) may be included in the Planning Grant budget request. Engagement of other staff and member leaders is encouraged. Think about what staff, committees, caucuses, or others have a vested interest in the work.

The detail behind your (up to) $10,000 Planning Grant budget will be entered directly into the online application (no attachment needed).

**C. Summary of GPS Fund Grant Request and Affiliate Support**

In order for NEA to better plan, please identify the GPS Fund Grant term you will be requesting (up to 3 years) and the amount – again this relates to your full GPS Fund application, which would follow the Planning Grant. For reference, awards of GPS Fund Grants are up to $250,000 per year for up to 3 years (with $50,000 being the minimum total request).

1. Total GPS Fund request amount (anticipated, up to $750,000).
	1. Total Grant Request \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*NOTE: If this amount is less than $50,000 stop here. Less than $50,000 is a different grant program (“State and Local Project Grant”), not a GPS Fund grant. Please look at NEA.org for more information.*

1. Term of grant request (anticipated, up to 3 years).
	1. 1 year (12 months)
	2. 2 years (24 months)
	3. 3 years (36 months)
2. Will this GPS Fund Grant be a renewal or continuation of a previous GPS Fund Grant?
	1. Yes (provide Grant ID Number and short description of prior grant)
	2. No

*NOTE: This applies to GPS Fund Grants only. Some grants may have only received one year of funding. If they apply for two more years, it would be a continuation grant.*

1. Verification of Affiliate Support (check all that apply). The provided options below are for ease, but other language may be used as appropriate.
* The Affiliate leader identified as a contact above represents the Affiliate and its Board of Directors in support of this proposal to NEA.
* The grant application goal is aligned with the program plan, and outcomes are aligned with the Local/State Affiliate strategic plan and goals.
* Affiliate staff (if applicable) and/or officers will be engaged in the grant plan.
* Affiliate leaders have communicated with the state and regional leaders about this grant application.
* The Affiliate Communications staff and/or committee will support promotion of the progress and outcomes of this grant through media outreach.
* Other (write out).

*IMPORTANT:* The person listed as the Affiliate Leader Contact will be the person who has verified this information.

**II. GPS Fund Proposal Information – Planning Grant Stage**

An abbreviated version of the full GPS Fund Grant Application is requested in this section of the Planning Grant. This will assist NEA in selecting which Affiliates will be eligible to continue developing their proposals and apply for a GPS Fund Grant.

This section of the Planning Grant application includes the following questions regarding your GPS Fund proposal:

1. Title
2. Brief Project Description
3. Priority Focus
4. Statement of Need
5. Draft GPS Fund Scope of Work \*
6. Draft GPS Fund Budget Worksheet (up to $750,000) \*
7. Anticipated Partnerships
8. **Title**

*TIP:*  Make it brief and descriptive and avoid acronyms. Help the reviewer know what you are doing and why. Align your title with your goal.

*EXAMPLE: Wishing Well Education Association (WWEA) (City, State) Early Career Educators Mentoring Program to Improve Educator Retention & Student Success*

*EXAMPLE: Hope Education Association Developing High School Programs to Support Future Educators and Improve Educator Diversity and Student Success*

**Write your Title:**

*CHECK:*

* Is it brief?
* Can you say it without reading it (is it memorable)?
* Does it have jargon?
* Would it be easily understood by the public?
1. **Brief Project Description**

*TIP:* Be brief, but highlight the 5 Ws - who, what, when, where, and why. The why is the key outcome, which you will have listed in multiple places. Be consistent with numbers in the description, scope of work, etc. Do not use jargon. Think of this as an elevator speech or the first paragraph of a newspaper article. Assume the general public is the audience.

*TIP*: This will include some repeat information from both your Title and your Statement of Need, and/or make the same point (and it should).

*EXAMPLE: XXX Education Association, in partnership with the XX Department of Education, 10 of the Public-school districts and business partners will collaborate to address educator retention and enhancement of student success over the next 3 years. This partnership will address the identified need in the 10 schools [may list school districts or schools] for mentoring for new educators in order to help students be more successful and support the educators in their chosen profession.*

**Write your Brief Project Description:**

*CHECK:*

* Does it include who, what, when, where and why?
* Is it consistent with the title, scope of work, and goal?
* Does it just have necessary explanations (not too long)?
* Would non-educators understand it?
1. **Priority Focus**

Applications with a primary focus on Early Career Educators and/or Racial Justice in Education will receive additional weight in the scoring and evaluation process. Determine about what percentage of the grant focuses on either or both priorities. Base it on your judgement.

Will your proposed work focus on either or both topics? If so, briefly explain which topic(s) and how it will be the primary focus of the grant. If not applicable, enter "NA".

*TIP:* Answer the question briefly and directly. This would give you a few extra points, but will not eliminate you if you have a more general focus. Again, just answer directly. If it is a focus, it should be important enough to have measurement and be in the goal.

**Write your response:**

*CHECK:*

* If you are focusing on one of these topics, did you name it/them and explain briefly?
* Did you note the percentage of work, if any, covers these topics?
* Did you answer the question directly and succinctly?
* Is your focus aligning here with the title, scope of work, and outcomes?
1. **Statement of Need**

Directions. Please include information that outlines the established need or problem(s) that your GPS Fund grant will address. Consider referencing Affiliate data and existing research to support the need and your approach (*i.e.,* is it an identified member need)? Include information about the targeted area of the grant, such as demographics and geographic area.

*EXAMPLE: [XXX Local Affiliate] loses 50% of early educators in the first five years (XXX School District data 2019). In exit surveys they identify the lack of mentoring as a key reason for their departure (cite source). According to (resource with citation) mentoring is an effective strategy to aid in retaining educators. XXX Education Association in partnership with the XXX Public Schools and businesses community will collaboratively develop a mentoring program in 15 locations that have the highest need and will include 100 new educators and 20-member mentors over the next three years to address educator retention and improving student success [cite resource that states impact on students]; we know these are impacted by the lack of retaining young educators. Retention will be improved to at least 75% in the targeted areas over three years. Member perception of being an educator and being a union member will be at 85% or higher.*

**Write your Statement of Need:**

***Check:***

* Is your need stated clearly?
* Do you site research that shows your approach is viable?
* Do you have actual numbers listed to show how many will be engaged?
* Is the statement of need consistent with the title, goal, and numbers in the scope of work and budget?
1. **Draft GPS Fund Scope of Work (Word document) \***

Directions. The Scope of Work has a lot of information as to the program/initiative/strategy that you will be implementing. It includes:

* **Goal** at the top
* **Key activities** (not all, just the key ones)
* **Anticipated outcomes & measurements** (consistent with the goal)
* **Timeline** within the term of the grant (1-3 years)
* **Members/Non-Members Engaged & Roles** (you will track this data; the total of this column should be consistent and included in the goal and statement of need)
* **Affiliate Staff/Leadership Engagement by Role and Purpose** (this shows the affiliate is engaged and this isn’t a one-person vision, but rather a capacity building venture)
* **Potential Partners** (List who you might reach out to in education, the broader community and business community)

*Tip:* Think of Key Activities in terms of two progress reports per year. This is not your “to do” list, but rather a key benchmarks list that you want to be accountable to in the grant, and that the grant or partners are paying for during the 1-3 years of the grant.

*Tip:* For members engaged think of appropriate caucuses or committees, various membership categories, and an overall member engagement strategy. Many affiliates think of members who take professional learning as the engaged group. In reality, the members documented should include those who develop curriculum, teach workshops, serve on advisory committees, board members, etc. All members who are supporting this work should be documented to appropriately represent the number of members engaged.

Directions: Goals and measurable outcomes are some of the most important parts of any grant application. For this application, they will be included in the Scope of Work template, which will be uploaded as an attachment in the Planning Grant application (directions are provided). An example is included with the Scope of Work template, which may be downloaded [here](https://www.nea.org/sites/default/files/2020-07/GPS%20Fund%20Scope%20of%20Work.docx). Complete this template offline and attach it to your Planning Grant application where it asks for the GPS Fund Scope of Work.

Goals/Outcomes: Using the Scope of Work template, please submit ONE comprehensive goal with related information for the GPS Fund grant application that you would work toward, if awarded a Planning Grant. Think about your overall goal instead of several smaller ones.

*IMPORTANT:* The final submitted GPS Fund Grant application is a slightly different format than the Planning Grant application. However, this information will aid the NEA team in assisting Planning Grant awardees in developing their proposals further. The questions are not going to be different; they will just be in a different format. Filling this out should be helpful as an advanced organizer.

Requirement: You must state one goal with measurable outcomes, which may take the form of a SMART goal: **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound. Specific means, what are you going to do with how many people (measurable) with results that include numbers and percentages of improvement. It is key to attain these goals during the length of the grant (time-bound), which are relevant to the purpose and results-oriented (big picture outcomes). If awarded a Planning Grant, NEA will assist in workshopping your Scope of Work (goal and outcomes) as you prepare for the GPS Fund application.

*Tip:* Your goal and measurable outcomes should be consistent with your title, brief project description, and statement of need. Do not use different terms. Think of your key terms as you would math, not creative writing.

*Tip:* This is one of the areas that should be a focal point. Pay special attention to the SMART components.

*GOAL EXAMPLE: XXX Education Association will provide 1 experienced educator to be a mentor for 3 new educators, for a total of 180 new educators in 10 school districts (name districts) to aid them in becoming more effective educators, further impact student success, and retain them in the profession over the next 3 years. All participants will report an 85% approval rating of all aspects of the program. Retention will improve from 50% to 85% for the new educators involved over three years. Partners will remain engaged and aid in the overall continuation and sustainability of the program.*

*GOAL EXAMPLE: XXX Local Education Association will develop 6 professional learning opportunities to serve 600 educators (members) to aid them in the areas of cultural competency, restorative practice, classroom management, differentiating instruction, preparation for Praxis exams, and NBCT support. Learning leaders/members (35 trainers) and participants will have an 85% or higher positive rating in relationship to supporting effective teaching and impacting student success. Member perception of the Affiliate and engagement will improve by 30% in a pre and post survey.*

*GOAL EXAMPLE - MULTIPLE OUTCOMES: Thirty early career educators (1-10 years) a year will be matched with veteran member/teachers to participate in a mentoring program at 5 locations over 3 years to impact student success, early career teacher retention, NEA membership, and teacher leadership. Success will be measured in the following ways:*

Communications/Student Success. *Early career educators will share videos on how this experience helped them impact student success that could be utilized by the Affiliate media outreach and NEA. Share these via NEA edCommunities in appropriate groups.*

Retention. *Ninety percent of participants, who continue to be employed, will remain in teaching over the first 3 years (90% retention, compared to the current 50%, “State” Dept. of Education, 2019).*

Impact on Student Success.  *Eighty percent of the reviews from every professional development and the final assessment will indicate that the early career educator perceived mentoring as helpful or very helpful in being a better teacher and affecting student success.*

Recruitment.  *Members and non-members will be engaged in this program. By the completion of the 3-year grant, 100% of the early career teachers will be NEA Affiliate members.*

Affiliate Leadership/Growth.  *All of the NEA mentor teachers will be members and grow in their leadership as reported via ongoing assessments, which will be tracked via NEA360 and reported annually.*

*TIP:* View the Scope of Work document before you write your goal. The Scope of Work, also known as a work plan or advanced organizer, will aid you in program development. Think of each key activity as something you would want to be accountable for and achieve in six-month increments (when each progress report is due).

*TIP:* Make a separate list of your own TO DO list, or that of your committee. Select only the KEY activities, as noted above, for the actual Scope of Work. Sending out a memo or recruiting committee members (or mentors, mentees) is a needed step, but it is not a key activity to be accountable long term.

*TIP:* As mentioned, think of the key activities in six-month increments.

Directions. When requested, upload a completed Scope of Work template to be included as part of your online Planning Grant application.

CHECK:

* Did you fill out the goal at the top of the Scope of Work?
* Did you break your Key Activities down into six-month outcomes sequentially?
* Do the outcomes in the Scope of Work reflect the same outcomes in your goal at the top of the page?
* Do the numbers of members/non-members engaged equate to what you have in the goal and statement of need?
* Is there alignment with the partners and affiliate support in the budget?
* Does your budget align with what you have in the Scope of Work?
* Do the activities in the Scope of Work align with the program intent?
* Will it be clear to the reader/reviewer what the plan of action is for the Scope of Work?
* For potential partners, have you noted plans for their engagement in the Scope of Work (and monetized it in the budget)?
1. **Draft GPS Fund Budget Worksheet (Excel file) \***

Directions. As part of your Planning Grant application, one Excel file (link [here](https://www.nea.org/sites/default/files/2020-07/GPS%20Fund%20Budget%20Worksheet.xlsx)) is required, which includes three (3) tabs, one for each year of funding you may request as part of your GPS Fund application. This file will need to be completed offline and attached in your Planning Grant application where it asks for the GPS Fund Budget Worksheet.

There are four columns in order to help you consider what the grant covers and what non-grant resources (*e.g.,* your Affiliate’s budget) will be used to support the work.

*REMINDER:* GPS Fund grants award up to $250,000 per year over 3 years (with a minimum of $50,000 in total).

*Tip:* Please see the GPS Fund Grant Guidelines ([**here**](https://www.nea.org/sites/default/files/2020-07/NEA%20GPS%20FUND%20GRANT%20GUIDELINES%202020%20-%20Approved%20Changes_CLEAN.pdf)), specifically the section “GPS Fund Grant Restrictions,” which lists the ways grant funds cannot be spent.

*Tip*: For your Affiliate or In-kind, things you might consider that may make this work more sustainable and impactful are:

* Leadership time (President, Executive Director, Officers, Board of Directors).
* Committee or caucus members volunteer/engagement time (Professional Learning, Social Justice/Human and Civil Rights, Organizing) – recommended amount or use what they would be paid by the district for committee work (if applicable).
* Use of a building (if applicable, use the rate charged to rent it out).
* $25 a volunteer/member engagement hour is an acceptable rate to use according to the independent sector. Alternatively, for educators/members you may use contractual workshop pay time or a percentage by hour of their professional contract. Estimate, with a justification for how you measured this.
* Actual dollars on the same initiative that are being budgeted and used for the work.

*Tip*: For Partners or In-kind, some considerations are:

* School district leadership time (use the independent sector amount per hour or average hour equivalent of district leaders)
* School board time (use the independent sector amount per hour)
* Department of Education leaders’ time
* Community partners’ time
* Airtime or newspaper coverage (what it would cost for that time or promotion)
* School sites or community sites used for trainings or meetings (amount you would have to pay to rent space to have the meeting/training OR what they charge for rentals)
* Schools may pay custodial staff above and beyond a rental fee
* Donations to a school or other foundation to aid with the collaborative initiative
* Steering committee or joint Affiliate, education group, business/community group that leads the effort collaboratively – time, location, food contributions
* Community, service club, government, foundation resources of grants aiding with the effort
* Grant writers from other organizations, including universities or foundations who aid in finding resources
* Actual dollars on the same initiative that are being budgeted and used for the work

*Tip*: For the worth of the time of affiliate staff and members, you may use the average leadership salary and benefits as an estimate for governance, and the average educator or ESP member salary and benefits for the worth of their time if it is volunteer. Use a reasonable baseline average.

CHECK:

* Verify your expenses with the Grant Guidelines as an allowed use of funds.
* Verify your math (although the Budget Worksheet should auto-total for you).
* Did you use averages and a reasonable basis for your figures on time of members, leaders, governance, and staff?
* Fill out the columns on Affiliate and In-Kind contributions. Usually, it is people time, printing, promoting, communications, financial record keeping time, or space. It is important to complete these! In order to sustain the work after the grant ends, it is important to have Affiliate engagement and support from the start.
1. **Anticipated Partnerships**

To sustain the work, partnerships are helpful and perhaps even necessary. Please list relevant partners that you will or may include in this work (do not include NEA Affiliate partners here). These are working partners that may or may not receive some grant funds. If you are working with another Affiliate on the grant who is sharing grant funds, list them in the earlier section on partner Affiliates that are co-applicants.

*TIP:* Think about “who is impacted if this work is not done successfully?” An example would be addressing the retention of quality early career educators. Businesses, the community, the school district – everyone is impacted when quality early career educators are not retained. Businesses are acutely aware of this, so consider making those types of outreach for potential partnerships. School districts pay the price if new educators are not retained (check the research in your area). Consider this type of exploration as you make a list below.

Directions. Please list proposed partnerships (or current partnerships) you may include in the GPS Fund Grant application, should you receive a Planning Grant. List only non-NEA affiliate partners here and detail the role of each.

|  |  |  |
| --- | --- | --- |
| **Non-affiliate Partner Name** | **Type of Organization (school districts, government entities, business partners, community organization, etc.; vendors who are being paid do not belong here unless there is a discount or other contribution not being paid for).**  | **Key Contact Name** |
|  |  |  |
|  |  |  |
|  |  |  |

*TIP:* Partners are very crucial to sustainability. In the planning stage, brainstorm organizations that might be engaged and include them in the planning, so they have input also.

*TIP:* Listing them is a sign of who you “plan” to reach out to during the planning process, or who you may already have a partnership with that you intend to engage. During the GPS Fund grant-writing phase you should obtain letters of support from these organizations outlining what they plan to do with you in the grant.

CHECK:

* Do you have partners listed that will or may be engaged in the GPS Fund Grant application and initiative?
* Does your list align with the potential partners listed (if any) in your GPS Fund Budget Worksheet?

**III. Data Tracking**

*INFORMATION:* All NEA grantees are required to report data on the metrics below, both anticipated numbers in the GPS Fund Application and, if awarded, actual numbers during progress reporting and at the end of the work:

* Anticipated numbers of members engaged.
* Anticipated number of members recruited.
* Anticipated number of sharable resources developed.
* Anticipated number of community stakeholders engaged.
* Anticipated number of leaders identified.
* Anticipated number of students positively impacted.

*INFORMATION:* Affiliates have various means of tracking member engagement. NEA360 is a newer resource that is available to many Affiliates. Grantees are not required to use NEA360, but they do need a system for tracking member and non-member engagement. Technical assistance is available to help the Affiliate consider use of NEA360. Ask your grant specialist for guidance.

Directions. To help NEA plan for your application and be aware of your systems in place, please answer the following questions. These data are required for implementing a grant, so some system should be in place or developed. Grant funds may be used to aid you in this.

1. Do you currently have a tracking system to monitor the grant activities and members, non-members, and partners engaged?
	1. Yes
	2. No
2. What tracking system do you utilize orplan to utilize?
	1. NEA360
	2. Linked to a school district or Department of Education system
	3. Our own system (please identify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	4. Unsure
3. Do you have the staff or volunteer support to keep up with the data collection?
	1. Yes
	2. No
4. Are there any metrics that you feel you would not be able to track should you receive a GPS Fund grant?
	1. Yes (please explain)
	2. No

*TIP:* Nebraska State Education Association has been a leader in utilizing NEA360 (which is in most states) to collect and track grant data. The webinar recording about their use of NEA360 for grants is [**here**](https://neahq-my.sharepoint.com/%3Av%3A/g/personal/dboyd_nea_org/EcJdtVMU4g1Mn39W1cRyAvMBfW47VLuziB_7kx_qDEIgFA?e=TPTUR2).

*TIP:* The data should include members and non-members, who take professional development courses, members who are mentored, as well as the mentors, curriculum developers, caucus members, professional learning committee members who guide the work, trainers, and partner time. Reflect all engagement in your data collection.

*TIP*: Give your team or staff time in the grant to learn and implement this system, as part of the grant timeline. Setting systems in place is a key to grant implementation success.

*TIP:* Data collection is important to justify the use of NEA grant funds. For progress reports, submit as many relevant numbers as you have.

*TIP:* It makes sense to use an existing system for data, such as NEA360, which many states already have in place. Connect with whomever is in charge of NEA360 in your state, if they are users.

*TIP:* Data will show the worth of these programs and aid in building the case for sustainability.

**This completes the Planning Grant Preparation & Support Packet**

***The good news is you have most of what you need in this document to help you develop your full GPS Fund Grant, just in a different format.***

**GOOD LUCK!**

**For suggestions about improving this document or feedback, please send to** GPSFund-PF@nea.org

**Questions?**

Join edCommunities and post your questions in the group “NEA Grants 4 Great Public Schools”. @ [www.mynea360.org](http://www.mynea360.org/)

View sample components and webinars on the same group site.

View and submit your Planning Grant Application [here](http://www.nea.org/grants/76225.htm).

Email GPSFund-PF@nea.org with any questions.