



Recommendations for Documenting Virtual GEAR UP Services and Work

We have all entered a whole new era of how we work, interact with one another, and serve students and families. While we do not have all the answers on how to best work in this virtual space, the purpose of these recommendations is to provide some means of capturing your virtual work as it relates to two areas: 1) *Virtual GEAR UP Service Data Entry*, and 2) *Documenting Virtual Outgoing Work*. This work was developed by a small group of GEAR UP researchers who are actively seeking the best ways to navigate data entry in a remote learning and work from home environment, as well as taking feedback from our webinar on this topic. These recommendations should be considered in light of COVID-19, noting that the U.S. Department of Education (ED) may provide more or less latitude than what is provided here; we simply do not know yet. **The bottom line is this: Keep providing and documenting services as you would, just record them as virtual.**

The first section (*Virtual GEAR UP Service Data Entry*) provides recommendations on how to capture and code services provided to students and families, for those services that students and/or families actively participate in. The second section (*Documenting Virtual Outgoing Work*) provides recommendations on how to document your work that may not be counted as a student or family service, but includes permissible activities that you can document to demonstrate your work and/or outreach. These recommendations will not fit neatly into every data management system or work protocols, so feel free to adjust and/or customize them to best meet your needs. These are recommendations to help us navigate our work; we will update them as we gather more information and as our remote learning, virtual world evolves. There are three premises to take note of as it relates to these recommendations.

1. It is unlikely that ED will be issuing any guidance, and if they do, it could be some time before that happens, so our intent was to establish some community-developed recommendations which can help systematize how we collectively approach this work and provide a rationale in the event that ED were to question how and why specific documentation decisions were made.
2. These recommendations are designed to balance the need for data fidelity by creating common recommendations for GEAR UP staff to use as they implement and document their work.
3. These are “preliminary” recommendations, and will be updated, adjusted, and/or modified as we gather information and learn best practices from constituents.

Virtual GEAR UP Service Data Entry

This section includes recommendations for GEAR UP services that include interaction and/or engagement with students and families. This section refers to services that include *back-and-forth communication* between you and students and/or families.

Phone calls

- **Definition:** Audio-only communication that happens in real time. Can be individual or small group (e.g., conference call).
- **Details:**
 - Label: Virtual service type = Phone
 - Service Category = Individual or small group and coded based on type of activity



- Time: Same as for in-person meetings

Live video chats

- **Definition:** Any exchange where you see and talk with a student/family member in real time. Includes Face Time, Zoom, Google Hangouts, etc. Can be individual or small group.
- **Details:**
 - Label: Virtual service type = Video
 - Service Category = Individual or small group and coded based on type of activity
 - Time: Same as for in-person meetings

Virtual instruction/synchronous learning activities

- **Definition:** Presentations or activities you deliver to students/family members in real time over the internet using Zoom, Google Classroom, Instagram Live, Facebook Live, etc. This includes instruction where students are active and engaged at the time of instruction.
- **Details:**
 - Label: Virtual service type = Video/Virtual Synchronous Learning
 - Service Category = Individual or small group and coded based on type of activity
 - Time: Same as for in-person activities
 - Note: Just as with in-person activities, some participants may arrive late or leave early and that is okay, just be accurate within reason.
- **Notes and Documentation:**
 - To count as a service, you need to be able to document that each student/family member is actually participating. One way to do this is to find a way to get participants to use the chat or comments feature of whatever platform you are using to document their attendance.
 - Some platforms also allow for participants to “Raise-a-Hand,” participate in in-session Poll Questions and Surveys in real time, as well as have end-of-session surveys that can be set up to go out to registrants/participants. Some platforms even track all of the comments and responses by participant log-in and/or student name.
 - Some platforms will not record student’s actual names, e.g., Instagram. You could conduct a survey of student’s Instagram handles and/or have a staff member verify students.

Virtual instruction/asynchronous learning activities

- **Definition:** Activities/assignments delivered to student/family members asynchronously through a learning management system (e.g., Google Classrooms, Blackboard, etc.). This includes instruction where students can participate on their own time.
- **Details:**
 - Label: Virtual service type = Video/Virtual Asynchronous Learning
 - Service Category = Individual or small group and coded based on type of activity



- Time: Record the average time anticipated to complete the assignment and use that time for all students for the assignment
- **Notes and Documentation:**
 - To count as a service, you need to be able to document that each student/family member actually participated. It is important for you to create a system for documenting who participated. This could be a simple spreadsheet that you translate to your data system.

Text messages and instant messages

- **Definition:** Two-way communication with individual students via text or instant message.
- **Details:**
 - Label: Virtual service type = Text or instant message
 - Service Category = Individual and coded based on type of activity
- **Notes and Documentation:**
 - There has been an ongoing conversation about how to count text messages since many are using this service to advise students. One of the common issues is whether/how to assign time to the texts. There has been discussion, but little consistency.
 - Because outgoing texts cannot necessarily be confirmed as read, they can be considered similar to mailings, which are outreach/recruitment tools but not necessarily direct services. However, when a student responds and a one-on-one discussion takes place, then that clearly indicates an interaction, and active participation by students.
 - Taking this into account, a strategy is to count every two incoming texts (i.e., from a student) as 5 minutes of service, using the date of the first text as the service date.
 - Outgoing texts (from the GEAR UP staff) would not be counted as a service, but if you want to track those as outreach, it is recommended that they are included within your 'Other' services recorded as 1 minute per outgoing text. As noted, these would not be recorded as direct GEAR UP services and they would not map to an APR service category.
 - For those who use Signal Vine, Remind, or Student Success Agency, they are able to give clients a copy of every outgoing and incoming message by ID. This list is not exhaustive.

Emails

- **Definition:** Two-way communication with individual students via email.
- **Details:**
 - Label: Virtual service type = Email
 - Service Category = Individual and coded based on type of activity
- **Notes and Documentation:**
 - Following the same logic as text messages, a strategy is to count every incoming email from a student as 5 minutes of service, using the date of the email as the date of service.
 - Outgoing emails (from the GEAR UP staff) would not be counted among these, but if you want to track those as outreach, it is recommended that they are included within your 'Other' services recorded as 1 minute per outgoing text. As noted, these would not be recorded as direct GEAR UP services and they would not map to an APR service category.



Documenting Virtual Outgoing Work

This section includes recommendations for documenting permissible GEAR UP activities that do not have follow-up engagement from students and/or families. This includes activities that are allowable and permissible for GEAR UP that *do not necessarily qualify* as a GEAR UP service because there is not student/family member engagement. It may still be beneficial to document your time in these activities, especially as GEAR UP staff are being asked to demonstrate their remote work.

- **Rationale:** Now that we are all working remotely, we are learning how challenging it is to connect virtually with students/family members during this unprecedented time. Unfortunately, students/family members must actively participate for a service to count toward GEAR UP grant reporting. However, the work you are doing to reach out and offer information/support to students/family members is still incredibly important. Given that, you can track that information internally, but not count it as a GEAR UP service.
- **Definition:** Documents, notifications, and/or instruction that you share out to students/family members to give them information, offer support, or invite them to reach out to you. These could include asynchronous presentations that are not responded to, text or instant messages, emails, letters, or other communications you send out to students/parents. For these outgoing services, it does not matter whether you get a response (responses are tracked separately per the section above, *Virtual GEAR UP Service Data Entry*). This section provides guidance on how to document your outreach only.
- **Exception:** There are, however, allowable and permissible activities that you might provide to students/family members that can be counted as a service and do not require follow-up engagement. A primary example of that would be an email campaign or social media campaign on FAFSA completion, college choice, etc. that can be reported on the Annual Performance Report (APR) or Final Performance Report (FPR) in the Executive Summary or as a state-wide initiative (for state grantees), but you would not include this in the secondary school service table, unless you coded it as “Other” and denoted that it was outreach only.
- **Notes and Documentation:** You can keep your own records of outgoing contacts so that you can document your time offering and providing allowable and permissible GEAR UP activities that are not responded to by students/family members.
- The list below outlines some key items to document your work. Again, this could be done on a simple spreadsheet you create.
 - Date of the attempted contact
 - Method (phone, asynchronous learning, text, email, etc.)
 - Name(s) of the students/family members (and associated student) who received the message (even if they did not answer it)
 - Very brief description of the content (e.g., checking in/emotional support, video about college choice, information about remote learning strategies, class tutoring, etc.)