



PEF Impact Grant PROGRAM OVERVIEW 2014-15

OVERVIEW: Petaluma Educational Foundation (PEF) administers the **PEF Impact Grant Program** to enable teachers, schools and districts to bring innovative and effective instructional ideas to reality despite ongoing economic challenges. Grants totaling almost \$2.5 million have been awarded to Petaluma area schools since 1983. PEF grants support quality instruction, student access and impact, and innovation aligned with a school or district's overall goals.

The **PEF Technology Initiative** in its third year strives to encourage use of these grants to directly impact instruction based on three guiding goals that:

1. Optimize the learning environment for all students (level the playing field and raise the bar to provide equal access and opportunity to learn for every student),
2. Actively engage EVERY student in learning, and
3. Support effective, quality instruction based on research and exemplary practices.

PEF Mission

Every child has a dream.

PEF creates community partnerships to fulfill these dreams.

By matching the passions of our investors with the creativity of our educators,
we fund programs to enhance and enrich the academic experience of all of our students.

We believe in our students.

We empower them.

We invest in their future.

PEF IMPACT GRANTS

The PEF Impact Grants award up to **\$15,000** for curriculum projects with significant emphasis on programs of extraordinary scope, impact or longevity. The PEF Impact Grant process spans a one-year period:

- **October 2, 2014:** Applications due to PEF by 4:00 PM, via e-mail to Katy Verke at katy@PEFinfo.com.
- **November 3rd & 4th 2014:** Second round for finalists. Oral presentations to Grant Committee.
- **November 17, 2014:** Awards announced. Selection process based on objective scoring matrix.
- **January 15, 2015:** Deadline for ordering supplies and equipment.
- **Spring & Fall 2015:** Site visit and evaluation by PEF Board and donors.
- **September 30, 2015:** Teacher final evaluation report due to PEF.

ELIGIBILITY FOR PEF IMPACT GRANTS

Teachers, groups of teachers, classified personnel, and principals in K-12 public, charter and not-for-profit private schools in the Petaluma Area are eligible. All grant applications must be collaboratively developed, approved and signed by the site principal or lead administrator.

To ensure a school or district-wide focus for PEF Impact Grants:

- Each elementary school may submit **only one** application.
- Each K-8 school may submit **up to two** applications: **one elementary and one secondary**.
- Each junior high school may submit **up to two** applications: **one per focus area**.
- Each senior high school may submit **up to three** applications: **one per focus area**.
- Each district may submit **only one** district-wide application.

***Schools with outstanding/unspent grant money from a previous grant year may not apply this year.**

FOCUS AREAS

PEF Impact Grant proposals must qualify in at least one of the six focus areas listed below:

Literacy/English Language Learners

Reading, writing, literature, spoken language/oral traditions or English Learner (EL) programs

Math & Science

Numeric skills, algebra, geometry, trigonometry, statistics, probability, calculus, biology, chemistry, physics, or earth sciences

Humanities

History, social science, geography, economics, political science, or psychology

Fine Arts

Drama, music, fine arts, and/or digital arts, including photography

Vocational Education/Life Skills

Business ventures, workplace-classroom exchanges, career/vocational counseling

Athletics, Nutrition, and Well-Being

Health, fitness, nutrition, and physical education; respect, responsibility, and self-esteem



**PEF Impact Grant
REVIEW AND SCORING PROCESS**

Round 1 (Screening): Each application will be read and scored by the PEF Grant Selection Committee using the attached Grant Scoring Rubric.

Round 2 (Presentation): Applicants who advance to a second round of screening will be required to do an oral presentation to the PEF Grant Selection Committee on Monday, November 3rd or Tuesday, November 4th 2014.

PEF IMPACT GRANT TIMELINE

	PEF IMPACT GRANTS Up to a 12-month process
October 2, 2014	Grant Applications Due by 4 PM
November 3rd & 4th	Round 2 – Finalist Presentations 3:30-7:30 PM
November 17, 2014	Notification to Applicants Initiate PEF Impact Grant projects
January 15, 2015	Place orders with your district.
Fall 2015	Site visit, follow up, feedback, sharing
September 2015	Teachers’ evaluation due to PEF

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www.facebook.com/PetalumaEducationalFoundation

PEF Impact Grant REQUIREMENTS AND GUIDELINES

❖ Up to \$15,000 maximum

1. Applications and proposals must be submitted according to instructions posted online at **www.PEFinfo.com** or available at the PEF office, 200 Douglas Street, Petaluma, CA 94952, 707.778.5063, **katy@pefinfo.com**.
2. Applications are to be emailed to Katy Verke, Program Director, at katy@pefinfo.com. Applications must be typed, well organized, and include the required components. Additional pages describing or supporting the grant proposal may be attached.
3. If advanced to the second round of screening, **a twenty-minute oral presentation to the Grant Committee will be required on November 3 or 4, 2014. Presentations will be scheduled between 3:30 PM and 7:30 PM.**
4. PEF Impact Grants must benefit students and instruction directly and may not be used for support of faculty research, faculty education (unless necessary for the proposed program), facilities improvements, labor, installation/modification costs, ongoing tech support, renewable/replacement/consumable costs or repairs.
5. While PEF Impact Grants should directly impact student instruction, grants cannot supplant funding typically provided by a site or district.
6. PEF Impact Grants will not be used to fund salaries, teacher release time, refreshments or catering, or equipment lists. Applications limited to funding equipment, supplies, tools or technology will not be considered without an accompanying project or program that describes instructional impact on students.
7. Funds must be used for the specific purposes stated and described within the grant application.
8. **Funds granted for equipment or technology must be integrated with an accompanying program or project.** All technology requests must be in line with your site and or District Technology Plan and must be collaboratively planned, reviewed, and approved by the site administrator.
9. Projects funded by PEF Impact Grants must be fully implemented by September 2015. All orders for supplies and equipment should be submitted through your own district by January 15, 2015.
10. Periodic written reports and/or on-site evaluations by PEF Board members and donors for PEF Impact Grant projects will be required. Final reports for all projects must be submitted to PEF no later than September 30, 2015.
11. Recipients may be asked to attend a PEF Grant Program Event or Share Fair or be highlighted in PEF marketing materials or social media.
12. As part of our donor stewardship program, grant recipients will be required to send a program update (which may include student-released images) to PEF and our donors.
13. Schools with outstanding/unspent grant money from a previous grant year may not apply.
14. Any unused funds will remain with the Foundation, not with district or school.



2014 PEF Impact Grant Application
INSTRUCTIONS AND SCORING MATRIX

APPLICATION DEADLINE

Please e-mail application no later than 4:00 PM on **Thursday, October 2, 2014** to Katy Verke, Program Director, katy@PEFinfo.com.

Handwritten, faxed or late applications will not be accepted.

PLEASE SUBMIT APPLICATION IN THE FOLLOWING ORDER

1. ___ **Cover Sheet**
2. ___ **Administrator's Statement and Signature Form**
3. ___ **Narrative** (*Read Instructions and Scoring Rubric*)
4. ___ **Itemized Budget and Documentation**
5. ___ **Checklist**

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2014 PEF Impact Grant Application

COVER SHEET

(PLEASE TYPE)

1. PEF IMPACT GRANT TITLE _____

Proposal Summary (50 words or less) _____

Amount Requested: _____ **Focus Area(s):** _____

School(s) or District Name: _____

Students directly impacted: # _____ **% of student body:** _____ **Grade level(s):** _____

Lead Contact (responsible for all site communication): _____

Position/Grade: _____ **Phone/Cell** _____

Site Address: _____ **City:** _____

Signature: _____ **Email:** _____

Alternate Lead Contact: _____

Position/Grade: _____ **Phone/Cell** _____

Site Address: _____ **City:** _____

Signature: _____ **Email:** _____

Please list all names and e-mail addresses of other participants.



PEF Impact Grant Application

ADMINISTRATOR STATEMENT AND SIGNATURE FORM

NOTE TO SCHOOL PRINCIPAL/LEAD ADMINISTRATOR

It is important that you are collaboratively involved in reviewing, if not developing, this PEF Impact Grant application. Please prepare a **statement of need and purpose, of no more than one page, making the case** for how this project supports the goals of your school or district.

SCHOOL PRINCIPAL/LEAD ADMINISTRATOR STATEMENT

1. I have been involved with planning this PEF Impact Grant and agree to oversee implementation following PEF guidelines and requirements.
2. **I have attached my own one-page statement of need and purpose** making the case for how this project supports our strategic site or district goals and instructional priorities, while increasing the capacity of the students, school, or district to realize long-term instructional benefit or impact.
3. I have checked with the district or site technology specialist to ensure that this project is consistent with any site/district technology goals and priorities.

Principal's Name: _____

Signature: _____ **Date** _____

Phone/Cell: _____ **Email:** _____

Number of students enrolled for current year (2013-14): _____

Students in EL Program: # _____ % _____

Students eligible for Free/Reduced School Lunch Program: # _____ % _____

Students in GATE Program: # _____ % _____

Current Site API _____ Pts.

Met Current AYP Targets: ENGLISH ___ Yes ___ No MATH: ___ Yes ___ No

Other Relevant Data:

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PEF Impact Grant Application REQUIREMENTS AND GUIDELINES

Each application must be complete, typed and include the following narrative components:

2. IN-DEPTH PROJECT NARRATIVE

Please use clear, concise language (*without jargon or technical terms unfamiliar to laymen without explanation*) to tell a story to readers about how your project will impact students, teaching and learning, consistent with the attached Scoring Rubric.

1. PURPOSE OF GRANT

Describe the **need** that your project addresses, identify the overall **goal**, and explain **how** this project will address this need.

2. PROCESS, AND TIMEFRAME:

Please describe how your project addresses these considerations:

- How will your project **increase capacity** to deliver high quality instruction to students?
- How is your project **collaborative**?
- How could others **replicate or adapt** your project with other students, classes, schools, or districts?
- What **positive change** will this project make to teaching and learning?
- In what **timeframe** and how will you know?

3. EVALUATION

What are your goals and objectives and how will you and others monitor progress, impact, or success? These objectives and activities should be observable and/or measurable and will be used to review and evaluate your program or project.

4. FUNDING AND SUSTAINABILITY

1. Have or will other funding, resources, or in-kind services been sought for this project? From where, to what degree? Has this been previously funded and, if so, will these funds, resources, or in-kind services continue (e.g., release time, consumable materials, food)?
2. Please describe long-term strategies for funding this project beyond the end of the grant period. (How can it be sustained and/or extended?)

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3. ITEMIZED BUDGET & DOCUMENTATION

A. *Include itemized costs, using the format below*, of specific project expenses including materials and accompanying costs or resources, as well as necessary costs or contingencies such as site or classroom preparation or modifications, installation or configuration expenses, technical and maintenance support, training and staff support services, renewable or replacement equipment or updates.

AND

B. *Attach* all legitimate (wholesale or retail) *supplier quotes* or other *price documentation*.

Itemized Costs			Total Expense	From PEF	From Other Source
Basic Equipment and Material:					
Quantity	Price ea.	Item			
Shipping and Handling:					
Sales Tax:					
Total Cost					
<i>Funding from other sources (itemize):</i>					
Installation/Modification Costs:					
Ongoing Technical Support:					
Ongoing Supplies Costs:					
Salaries/Training/Staff Support:					
Renewables/Replacements/Consumables:					
<i>In-kind resources or services from other sources (itemize):</i>					
Total Requested from PEF					

**Unused funds will remain with the Petaluma Educational Foundation.*

PEF Impact Grant Application

CHECKLIST (Complete and include with application)

To ensure that your application has been properly prepared and contains all information necessary for PEF's Grant Committee, please review your application comparing it to the scoring rubric and this checklist and include the checklist with your submitted application:

- Have you completed your application according to the instructions?
*(Attachments or additional pages are acceptable; however, the cover sheet, application narrative, and Administrator's Statement **must** be completed and submitted with your grant application.)*

- Have you included the required approval, signature, and statement from your site administrator?

- Is your grant application typed, complete, and organized according to the requirements and guidelines of this packet?

- Have you provided a complete description of your project including evidence and examples that address the scoring rubric criteria?
(Applications should include how funds will be used, how many students the project will impact, if the project can be applied to multiple classes, repeated for subsequent class years, and how the project aligns with the goals of the district.)

- Does your project budget accurately reflect all anticipated expenses for your project?
(Applicants should secure specific price quotes or provide materials that reflect the actual cost of supplies, equipment, etc. Broad price ranges or vague cost estimates are not sufficient.)

- Have you researched and documented funding and/or services available for your project directly through the site or district? Have you researched for the best price?

- Have you described how you collaboratively developed your project with colleagues, administrators or other partners?

- If your application includes funds for equipment or technology, have you detailed the instructional program, project, or goals supported by this equipment or technology? *(Applications limited to funding equipment, supplies, tools or technology will not be considered without an accompanying project or program that describes instructional impact on students.)*

- Have you made sure that your application does not include funding requests for salaries, labor, installation, ongoing tech support, release time, refreshments, food and beverage services, supplies or catering services?

- Have you re-read your application to ensure your application describes maximum impact, meets PEF criteria, and includes all required components?

PEF Impact Grant Scoring Rubric

Grant readers from PEF will review each application weighing the quality of each relating to the following eight components. Readers will look for evidence within each application to support their ratings between 1 and 4.

Grant Component	Score 4	Score 3	Score 2	Score 1
<p>1. Project Narrative <i>The action plan that describes goals, roles and resources embedded in your project as well as a) the need being addressed and b) the process, strategies, and projected timelines</i></p>	<p>Clearly and concisely describes how to meet a specific needs showing steps of a process, necessary resources and reasonable timelines</p>	<p>Describes how to meet a need including a process, resources, and reasonable timelines</p>	<p>Outlines a plan to accomplish a goal, possible resources, and a general timeline</p>	<p>Includes a goal and a plan with vague steps and undefined resources, and/or an unrealistic timeline</p>
<p>2. Student Impact, Engagement, and Outcomes: <i>Thoughtful, deliberate planning, delivery, assessment, and analysis of instructional practice that will positively impact student learning</i></p>	<p>Briefly describes specific changes most likely to positively impact achievement; describes how active engagement will improve learning. Provides examples of how students will interact with other students or adults.</p>	<p>Describes changes that will impact achievement or increase students’ interactions and engagement with knowledge, skills, or others to improve learning</p>	<p>Lists changes that might impact achievement or increase students’ interactions and engagement with knowledge, skills, or others to improve learning</p>	<p>Describes how this project might change the classroom, school, or instructional practices, but fails to link these changes to improved teaching or learning</p>
<p>3. Sustainability <i>Ongoing funding and technical support that sustains the technology infrastructure, human and digital resources, and staff development necessary for full project implementation</i></p>	<p>Clearly describes how funding, technical and human resources will be used to support the processes necessary to implement this project during and beyond the grant period</p>	<p>Describes how funding, technical and human resources will be used to support the technology and/or materials necessary to implement this project during and beyond the grant period</p>	<p>Lists how resources will be used to support the technology or materials necessary to implement this project during the grant period</p>	<p>Lists resources necessary to support materials required for this project</p>
<p>4. Organizational “Scalability” <i>Potential to build the capacity of others or the organization to extend, expand, or deepen the positive benefit of this project beyond its initial scope</i></p>	<p>Describes concepts, ideas, or examples of how this project has high potential to be extended, expanded, or deepened to maximize a positive impact.</p>	<p>Describes ideas about how this project could be extended, expanded, or deepened to increase positive impact.</p>	<p>Provides a few possibilities or examples of how this project might be adapted to increase a positive impact.</p>	<p>Provides few, if any, ideas or examples of how this project could extend impact beyond the scope of the grant</p>

<i>Grant Component</i>	Score 4	Score 3	Score 2	Score 1
<p>5. Professional Collaboration & Development <i>Supports a culture of routine professional collaboration and ongoing professional development and training that integrates and uses technology (or this initiative) as a seamless instructional tool used regularly by students and teachers</i></p>	<p>Describes specifically how and when teachers and administrators will routinely collaborate to integrate this initiative or technology within classrooms, grade levels, departments, or school wide so they can analyze and adjust teaching and learning.</p>	<p>Describes how and when teachers and administrators will collaborate to integrate this initiative or technology within classrooms, grade levels, departments, or school wide so they can discuss improvement of teaching and learning</p>	<p>Provides a schedule of when teachers and administrators will collaborate to implement this project within classrooms, grade levels, departments, or school wide</p>	<p>Provides a schedule of when teachers and administrators will collaborate to implement this project</p>
<p>6. Equitable Access & Opportunity <i>Robust and reliable access and opportunity for all to benefit from this initiative and potential to improve teaching and learning for every student</i></p>	<p>Articulates how specific students and teachers, who may not currently have access to this instruction, or technology, will benefit and be ensured continuing access, opportunity, and advantage</p>	<p>Explains how specific students and teachers, who may not currently have access to this instruction, or technology, will benefit</p>	<p>Describes which students and teachers, who may not currently have had access to this instruction, or technology, could benefit</p>	<p>Describes how this project's instruction, or technology could benefit students and teachers</p>
<p>7. Accountability & Progress <i>A collaborative, process that ensures ongoing analysis of this project's progress, challenges, and potential</i></p>	<p>Describes a specific, ongoing process to monitor, measure, and evaluate progress and impact based on an action plan and describes how and when any mid-course adjustments will be made, if necessary</p>	<p>Describes an ongoing process to evaluate progress based on an action plan and describes how any adjustments will be made, if and when necessary</p>	<p>Explains how this project will include evaluation of progress based on the plan and describes how adjustments might be made</p>	<p>Explains how this project might include evaluation of progress based on the plan</p>
<p>8. Budget <i>The itemized breakdown of both direct and indirect costs, include funding, resources, or services covered by other sources beyond the PEF grant</i></p>	<p>Accurately and succinctly describes not only the direct and indirect costs of this project, but how funds or resources from other sources will be used to ensure maximum benefit and implementation; reflects thorough and current research and costs</p>	<p>Accurately describes direct and indirect costs involved in this project and how funds or resources from other sources might be used to complete or supplement this project; reflects complete and current costs</p>	<p>Lists direct and indirect costs involved in this project and how from other sources might be used to complete or supplement this project; appears to reflect current costs</p>	<p>Lists direct and indirect costs involved in this project; appears to reflect current costs; considers few if any other funds, resources, or services</p>



**PEF IMPACT GRANT
FINAL SELF EVALUATION**

To be Completed and Submitted by September 30, 2015

Date: _____ **School:** _____

Your Name: _____

Grant Title: _____

Lead Teacher/Administrator: _____

Please write a **one-page narrative describing your implemented PEF Impact Grant** (include documentation and digital pictures of your program, if available.)

Be sure to include the answers to the following questions:

Goals/Objectives: *were your stated goals and objectives achieved?*

Impact/Students Reached: *how many students are/were impacted?*

Equipment and/or Materials Purchased: *is equipment installed/materials purchased and in use?*

Curriculum: *is equipment being effectively used; new teaching strategies implemented?*

Measurements of Success:

Student engagement: *has it improved? Can you document this engagement?*

Achievement: *are there assessment/higher testing scores related to new delivery?*

Sustainability: *will the changes/enhancements last beyond this year?*

