2023 HEP and CAMP APR Webinar Transcript

September 11, 2023, 1:00-2:30PM ET

Ballard, Katrina 14:17

Hello, everyone. We're going to go ahead and get started, and we can go ahead into presenter mode. Welcome, everybody, and welcome to the 2022-2023 Annual Performance Report Webinar for the High School Equivalency program and the College Assistance Migrant Program. Thank you for joining us on this day of remembrance. My name is Katrina Ballard, and I'm the Data and Evaluation Subject Matter Expert for the Office of Migrant Education. I'm joined today by my colleague, Jessica Stein, an HEP CAMP Program Officer.



Ballard, Katrina 15:47

On the next slide, we have just a few reminders for folks as you're joining. This webinar is being recorded. The slides have been shared over email, and we will send them again after this presentation. Because this is a webinar, video is disabled for participants, and participants are muted to begin, but during the question-and-answer time, please feel free to unmute and ask a question. You can also use the chat, and we will try to answer the questions in the chat as we go along. If there's something we can't answer during the presentation, we'll do our best to get back to you afterwards over email. Thanks. The next slide, please.



Ballard, Katrina 15:47

So, during today's presentation, we'll review how to complete the annual performance report for the 2022-2023 reporting period. We'll go over the basic information about the APR – Annual Performance Report – and review common errors that happen when completing the report and submitting your data well. We'll also share tips for creating a high-quality report, including using the optional grantee workbook.



Ballard, Katrina 16:15

Please note that, if you're part of a new project, meaning that your project was funded as new project in FY2023, what we call Fiscal Year 2023 cohort, and you do not have a previous HEP or CAMP grant, you will not be completing an Annual

Performance Report (APR) this year, but you'll complete an interim performance report in February of 2024. So, it might still be useful for you to attend this presentation to learn about OME's expectations for data collection, as the IPR elements are a subset of the APR data elements. In addition, please be aware that OME will offer a webinar and office hours for the IPR and also provide the IPR forms later this year. Please stay tuned as we'll share information on the HEPCAMP listserv and G5 soon. Next slide, please.

Ballard, Katrina 17:10

These are the authorities that address reporting requirements for HEP and CAMP, including legislation and regulations, and for more information, you can visit our website. Next slide.



Ballard, Katrina 17:25

So, the annual performance report or a PR is a report that each grantee must submit to receive continued funding under a multi-year award. The report provides the most current performance and financial information about a discretionary grant or cooperative agreement, and the department requires grantees to use their APRs to report on their progress toward meeting performance measures.



Ballard, Katrina 17:57

I saw some chatter about volume. Let us know if you're having any issues, and some of our other team on can assist. So, APRs are aligned with the 12-month budget period. This year, the APRs will be due on Thursday, November 9th, so the reporting period is aligned with the 12-month current budget period, July 1, 2022 to June 30, 2023. So, throughout the presentation, we're going to be using reporting period and budget period interchangeably, and then when we refer to the previous budget period, we are referring to 2021-2022. So, remember, it's very important that you should submit your APR on time as the program office uses data from the APR to determine whether grantees have made substantial progress and to inform the issuance of non-competing continuation awards. We'll review this submission process in detail at the end of the webinar. You can see on the screen here the deadline and the email address where you'll be submitting it, but we'll go into more detail at the end. Next slide, please. So, all project directors should have received four files on August 9th and September 8th. They include file one – the cover sheet, which

is a Word document file, file two - the performance report data form which is blocks A to E&F in Excel, file three - the optional grantee student workbook, which is also in Excel, and file four – the actual instructions and that should be a PDF file.



Ballard, Katrina 19:42

Please contact us if you have not received these files. You can see the email address on the screen here. Next slide, please. The APR is organized into two files, a cover sheet, and a data form. The data form has what we call blocks of information organized as blocks A through F, and blocks A through C are composed mostly of numbers and blocks. Blocks D and E have words and numbers. This table is a summary of the sections, the file type, and how they are to be submitted, and this information is presented in the APR data form in the notes tab. You should have this in your files as well.



Ballard, Katrina 20:26

Next slide, please. Here's a screenshot of the optional grantee workbook that you might use to organize your data before you fill out your APR. It was included in the email that was sent out on the listserv with the APR materials as a reminder. This is optional. Please do not submit this to OME. The workbook includes two tabs that feature columns where you can input information about your students and help you tally enrollment and other numbers about them. This here what we're looking at on the screen is the second tab. It's student level, so it has a row for each student, and then you'll see on the next screen that this is the first tab.



Ballard, Katrina 21:08

Once you fill out the information on the second tab, it will automatically populate the cells on the first tab that you can see here. That will summarize the information you need for your APR, and we hope that you find it helpful. Next slide, please. So again, please do not submit the optional grantee student workbook to OME.



Ballard, Katrina 21:30

That's because this workbook contains personally identifiable information, or PII.

This is a FERPA term referring to identifiable information that is maintained and education records and includes direct identifiers, such as the student's name or ID

number, indirect identifiers, such as a student state of birth, or other information which can be used to distinguish or trace an individual's identity either directly or indirectly through linkages with other information. So, that definition is on the screen here.



Ballard, Katrina 22:03

When you submit reports or emails to OME, please do not submit PII. Please redact PII or provide broad details about students, such as general descriptions, aggregated student data, or summaries. Next slide, please. So, we are going to dive into the definitions for the APR data elements. These are all the terms that you should be very familiar with when preparing to complete the APR form. We're going to go into each of these. There is some overlap in the definitions with HEP and CAMP, but we're going to review the definitions for each program separately to make sure that it's clear for each program. Next slide, please. We're going to first review the definitions for HEP. Next slide. So, we'll start with number funded to be served for HEP. This means the number of participants that are officially funded by the HEP grant to be enrolled in high school equivalency instruction in your HEP project in the reporting period. You can serve more than the number for which you are funded, but the number funded cannot be amended or changed if grantees serve fewer students than the number of funded. Performance measure one is calculated using this data element here, the number funded to be served. Next slide, please.



Ballard, Katrina 23:33

The number actually served is the number of HEP high school equivalency eligible students who completed intake and were enrolled and attending HEP HSE – high school equivalency – instruction for at least 12 hours of instructional services in this reporting period or who are enrolled for the sole purpose of taking the HSE assessment in the reporting period.



Ballard, Katrina 23:58

So, if grantees are serving more students than the number funded to be served, performance measure one is calculated using the number served here. Next slide, please. New participants are new to the project completed intake and were enrolled and attending HSE instruction for at least 12 hours. Students who participated in HEP services during budget periods other than the immediately previous budget period

are considered new participants. This count would also include any students who participated in HEP services in the immediately previous budget period but were not counted as persisters at the end of that budget period because they did not enroll in HEP services during the current reporting period until after the APR was submitted. Next slide, please. Returning participants? Perhaps they completed intake but did not attain an HSE in the budget period immediately previous to the one being reported. Returning participants were counted as persisters in the immediately previous budget period. In the current budget period, they were enrolled in attending HSE instruction for at least 12 hours before the APR due date. So remember, the previous reporting period's persisters are the current year's returning students. The number of returning participants should equal the number of persisters, including persisters from the fifth year of the grant from the budget period immediately previous to the one being reported, and students who returned to HEP in the current reporting period from any budget period other than the immediately previous budget period are to be reported as new participants in the current reporting period. Next slide, please. Persisters completed intake and were enrolled in attending HEP HSE instruction for at least 12 hours in the current budget period, but did not attain an HSE, but they either reenrolled for continuing instructional services in support of an HSE in the subsequent budget period prior to the APR submission date, or they reenrolled for the sole purpose of taking the HSE assessment in the subsequent budget period prior to the APR submission due date. So again, the previous reporting period's persisters are the current year's returning students. You always want to be checking both of those. Persisters can be counted and all years of the five-year grant cycle. Those students who are counted as persisters in the fifth year's performance report will be counted as returning students in the year 1 APR of the next grant. Since the students are persisters from the previous grant's Year 5, you do not need to reestablish eligibility for those students. Next slide, please. Attainers are HEP HSE eligible students who received an HSE certificate by the end of the reporting period. To best capture this data, projects should maintain a database of the students enrolled, identifying those students who attain an HSE, the date of HSE attainment (which is the actual date that the student took the last HSE exam), and the HSE credential or identification number. Returning students who do not complete HSE coursework but do attain an HSE are counted as attainers. Next slide, please.



Ballard, Katrina 27:45

And then, placed are students who attained an HSE in the current reporting period. Report the number who entered postsecondary education or training programs, upgraded employment, or entered the military. In situations where students attain multiple placements, say they went into postsecondary education and upgraded employment, you would count each student only once for the total in the APR. Placement status should be captured any time after the HSE is attained, but before the performance report is due for that same reporting period.



Ballard, Katrina 28:23

And it should be based on actual placement, not anticipated placement. And next slide, please. This is our last definition for HEP, and we're going to do some review. So, withdrawals are the number of served HEP students who completed intake and were enrolled and attending have HSE instruction for at least 12 hours in the current reporting period, and they left the project without attaining an HSE, or they did not return for instruction in the subsequent budget period prior to the APR due date. So, if a student who is in withdrawn status for the current reporting period, and then they return to the project after the APR is submitted, that student should complete the intake process again and be counted as a new student in the subsequent budget period. So, on the next slide, we're going to review a visual representation of these definitions. Hopefully, this can be a good refresher for folks, so we're going to start with a new participant in the current budget period to be reported. So, a new participant would have completed intake and enrolled in the 2022-2023 budget period. So that's what you see on the far left there. Then, from there they would either become an attainer, meaning they attained an HSE. Then they go on to be placed, which is either postsecondary education or training, upgraded employment, or the military, or if they did not attain an HSE in the 2022-2023 budget period, then they could be counted either as a persister. If they've reenrolled in HEP for 2023-2024, then the next year you would report them as a returning student, or they'd be counted as a withdrawal if they did not enroll in HEP for 2023-2024.



Ballard, Katrina 30:26

If they do enroll in HEP after the APR is due on November 9th, you would report them as a new participant next year. So, on the next slide, we are going to put this knowledge to the test, and we're going to have a little quiz. So, we're testing out a new feature. I just want to share with folks. When I launched the quiz, it will pop up, and it may block your view of the slides. However, you can feel free to close that pop up and you can hopefully see you will be able to see the quiz in the chat box.

So, I'll read the question, and then I'll launch the quiz, and hopefully you'll be able to answer in the chat. So, on a completed intake in 2021-2022, which is the budget period immediately before the one being reported, she did not attain her HSE and was reported as a persister in 2021-2022. In September of 2022, which is the current budget period, she enrolled in and attended college courses. The APR for that reporting period was due November 9, 2022. So, how should Anna be counted in the 2022-2023 budget period? So, I'm now going to launch the poll. Thanks. Yes. Again, just a reminder, if you are seeing the pop-up, and you need to return to the question, you should be able to close that out, and you should be able to respond in the chat.



Ballard, Katrina 32:01

So, how should Anna be counted? Is it new participant returning participant, or persister? So, I'll give folks a few minutes to think it over, and then we'll share the answer.



Ballard, Katrina 32:30

I see in the chat that somebody pointed out a typo on this question. Apologies. So, this should say that they were attending HEP instruction. Thank you for catching that. So, hopefully, everybody had a chance to respond. It looks like still a few more responses are coming in, but just in the interest of time, Anna should be counted as a returning participant for the 2022-2023 budget period. We're going to have a couple more of those. That was the first one.



Ballard, Katrina 33:07

So, folks who are still kind of trying to figure out how to how to work the poll, you'll have another opportunity. We'll move on to the CAMP definitions, and now just keep in mind, you will have a quiz. So, now, you have that advanced knowledge. So, thank you all for submitting your responses and we're going to go ahead and review the CAMP definitions now, starting with the number of funded to be served on the next slide. So, similar to HEP, the CAMP number funded to be served means the number of participants officially funded from your approved application by the CAMP grant

to be enrolled in CAMP instruction in your project during this reporting period. You can serve more students than the number for which you are funded, but the number funded cannot be amended or changed, and if a grantee serves fewer students than the number funded, performance measure one is calculated using the number funded to be served. Next slide, please. The number of CAMP students served are CAMP students who completed intake and were enrolled in attending college courses past the date when students can no longer add or drop courses or a census state, whichever is the point when a student's official enrollment status for the academic term is evaluated, and if grantees serve more students than the number funded to be served, performance measure one is calculated using the number served. Next slide, please.

Ballard, Katrina 34:52

New participants completed intake, enrolled full time, and are attending college past the date when students can no longer add or drop courses or census date. Students who participated in CAMP services during budget periods other than the immediately previous budget period are considered new participants, and the count would also include any students who participated in CAMP services in the immediately previous budget period but were not counted as persisters at the end of that budget period because they did not enroll in CAMP services during the current reporting period until after the APR was submitted. Next slide, please. So, returning participants are CAMP first academic year college students who completed intake in the budget period immediately before the one being reported, did not complete the first academic year of college in the previous budget period. and were enrolled in and attending CAMP instruction full-time past the add/drop date during the current budget period before the APR due date. The previous reporting period's persisters are the current year's returning students, and students from the immediately previous budget period who returned to the CAMP project during the current reporting period after the due date for the APR must be reported as new participants in the current reporting period. Next slide, please. Persisters are CAMP first academic year college students who completed intake and were enrolled and attending college courses past the date, after which students can no longer add courses or census state, whichever is the point when a student's official enrollment status for the academic term is evaluated and they didn't complete their first academic year of college, and they reenrolled for continuing instructional services in

support of completing their first academic year of postsecondary education in this subsequent budget period prior to the APR submission due date.



Ballard, Katrina 36:56

So again, remember the number of persisters in the current reporting period will be the number of returning students in the next reporting period. Next slide, please. First year completers for CAMP must be enrolled at the institution of higher education and CAMP with full-time status during all academic terms of the regular academic year, successfully completed their first academic year in good standing. So, first academic year, among other things, completes a minimum of 24 semester or trimester credit hours or 36 quarter credit hours or 900 clock hours for program measured in clock hours. Successfully completed means that the IHE considers the student to have passed the coursework associated with those hours. In addition, please consult the APR instructions regarding any credits earned in high school and remedial coursework. Next slide, please.



Ballard, Katrina 38:03

So, continuing students are those students who completed their first academic year of college and continued in postsecondary education programs. To be counted as continuing and postsecondary education, the student must reenroll in an institution of higher education in the academic year immediately following the one in which he or she is reported as being a first academic year completer and must remain enrolled past the date when students can no longer add or drop courses or a census date, whichever is the point when a student's official enrollment status for the academic term is evaluated. This measure should be taken any time after the first academic year of college is completed and before the performance report is due, and it should be based on actual enrollment and not on anticipated enrollment. Next slide, please. And the last definition is for CAMP withdrawal. Those are the number of CAMP students who completed intake and were enrolled in and attending college courses past the IHE's date after which students can no longer add courses or census state, whichever is the point that students official enrollment status for the academic term is evaluated, but who left the CAMP project without completing the first academic year of college and did not reenroll for instruction in the CAMP project by the APR to date of this subsequent budget period. So again, on the next slide, we'll do a little bit of review. This is a visual representation of the CAMP definitions starting with a new

participant in the current budget period to be reported, which is what you see on the left side of the screen. So, a new participant would have completed intake and enrolled in the 2022-2023 budget period, and then they would either become a firstyear completer, meaning they completed their first academic year and then they go on to become continuing students. Or if they do not complete their first year in the 2022-2023 budget period, then they may be counted as either a persister if they've enrolled in CAMP for 2020, 2324, and then the next year, you would report them as a returning student or a withdrawal if they did not enroll in CAMP for 2023-24. If they do enroll in CAMP after the APR is due on November 9th, then you would report them as a new participant next year. So, I'm going to get ready for another guiz. We have two questions this time. So, on the next slide, I'll read out the question in just a minute. Another reminder, when the quiz pops up, you can close it out so that you can view the slides and you can respond to the question when it's in the chat. So, Jaime completed intake and was enrolled in attending college courses past the add/drop date during spring of 2023 in the current reporting period. He did not complete his first academic year of college during the 2022-2023 reporting period in August of 2023. He reenrolled to continue completing his first year. How should Jaime be counted, and I'm launching the poll now again. You can close this out if you need to, and you can answer in the chat. And should Jaime be counted as a new participant, as a returning participant, or as a persister? I'll give folks a minute to think about it and enter their response. OK, so I'm seeing that most folks got this one. The answer is persister. I do see a question in the chat, and we will make sure we have time to go over some questions in just a moment. Before that, we will go to one more question, and then we can go to answer some questions. OK, so last quiz question here. Alex completed intake, enrolled, and attended college courses two years ago but did not complete the program. They did not return to CAMP in 2021-2022, which is the previously reported budget period. In the current reporting period September of 2022, Alex completed intake, again, enrolled and attended college courses. How should Alex be counted? And I'm going to launch this last question here. Should Alex be counted as a new participant, a returning participant, or a persister? And again, feel free to close out the box and answer in the chat. So, I am seeing a lot of responses on this one. I think this one is our highest score so far, so that's awesome. And Alex is a counted as a new participant. So, thank you for entering your answers and for trying out these quiz questions. It's a great way to see if there's something you're not understanding. Please feel free to ask questions, so I

think that's what we're going to be doing next before we dive into the actual forms. We will go ahead and answer some questions. So, I did see one in the chat. Persister is not mutually exclusive from new participant and returning participant. Is that right? So, when you are counting students, they can't be all of those things at the same time. So, let's actually back up to our review slide on slide 33 just so that we can look at that together, so you'll see here that there that everyone is kind of starting in the budget period as a new participant. They may end up as a persister or a completer or a withdrawal.

Ballard, Katrina 45:01

So each of these three columns sort of shows the choices for that point in time. If someone withdraws before the APR due date, then the next budget period, they would be a new participant. If they reenroll before November 9th, then they're counted as a persister, and then next year, they're a returning student, so you wouldn't count the same student as a persister and a returning student at the same point in time. That student starts out as a persister and then becomes a returning student. The next budget period, I hope that answered the question. Everybody has to be a new participant at some point, but kind of where they go from there depends on what is happening. So, if anyone needs more clarification on that and please feel free to, you know connect and reach out to us over email or ask additional questions. I'm just going to kind of scroll up and just make sure I don't think I see any other major questions, but if folks would like to take this opportunity to enter a question in the chat or unmute and ask a question about any of these definitions, please feel free to do so now, and we will have additional time at the end for questions. Feel free to put those questions in the chat as we go along, and we will answer some more at the end. At this point, I will turn it over to Jessica to go over the 2023 HEP CAMP APR forms.

Stein, Jessica 46:54

Thank you, Katrina. Just going to get my screen up here one moment. Alright, so next, as Katrina noted, we will review the APR forms for HEP and CAMP. First, we will review the cover sheet. This is a Word document and must be submitted as a PDF.

Stein, Jessica 47:25

Please use the cover sheet that we sent via the listserv. This is the most up-to-date

version and includes the reporting period year July 1, 2022 through June 30, 2023. First, you will update the header at the top. Enter your grantee name and PR number and select your grant year. Next, enter your general information into sections 1 through 6. Please note that Section 2 (that is, grantee NCES ID number) only pertains to institutions of higher education. Nonprofit organizations do not have NCES ID numbers, so if you're a nonprofit organization, you can leave that blank. In the next section on reporting periods, you'll see that section 7A pertains to the 12-month budget period, which is July 1, 2022 through June 30, 2023, unless you received a nocost extension for a final year project. If you received a no-cost extension for a final year project, please update the end date to reflect the date on which your grant project ended. Section 7B pertains to the five-year performance period. This period varies depending on the year in which your grant started. Grantees with no-cost extensions will enter their no-cost extension end dates. So next, we will focus on the Section 8 budget expenditures table, which can be found at the bottom of that first page of the cover sheet.

Stein, Jessica 49:10

In 8A, you will enter the actual expenditure amount from last year's budget period (that is, the total expenditures for 2021-2022). Please be sure to include both dollars and cents in this amount, and then in section 8B, you will enter the actual expenditure amount for this reporting year's budget year (that is, the total expenditures for 2022-2023). Again, please enter both dollars and cents. This amount must match the total expenditures that you report in block E of the APR data form. The non-federal funds column of this table to the right pertains to grantees who receive matching funds or participate in cost sharing. And please note that actual expenditures for the entire project period only pertains to final performance reports. So next, we will review the second page of the cover sheet. In section 9 on the second page, you will enter indirect cost information. This section is usually completed by the business office at your institution or nonprofit. In 9A and 9B, please select yes or no. If you're using an indirect cost rate agreement approved by the federal government, please enter the date range for this agreement into 9C and note the approving federal agency. For final performance reports, you are required to select the type of rate under 9C. The final subsection, 9D, only pertains to restricted rate programs. Section 10 only applies if the IRB review attachment (that is, attachment HS-1) was attached to your GAN. Section 10 rarely applies to HEP and

CAMP grantees, so please be sure to check "not applicable" if this section is not applicable. In section 11 in that section, please confirm that you submitted complete data on performance measures in the APR data form by checking yes. The final section, section 12, must be completed by the authorized representative. Please note that electronic signatures are acceptable. So, on the next slide, we're focusing on a common cover sheet error. Please remember to mark the approving federal agency. So, in this example, the approving federal agency is the US Department of Education, known as E-D or ED. If the approving federal agency is an agency other than ED, please specify the approving federal agency in the blank next to "Other." So, now, we will review the performance report data form. While you complete each block of the data form, please refer to the guidance. The guidance includes notes found in the turquoise cells of the data form and the APR instructions that the OME sent via the listserv and also via G5. In blocks A, C, and E of the performance report data form, you will see a data input accuracy result of either "good job" or "please check" in a green box. Hidden formulas are making the calculations for these green boxes. If the green box includes "good job," this indicates that the totals appear to be accurate because they match other totals found in the file.

Stein, Jessica 52:47

If you receive a "please check" error in that green box, please check your data for accuracy. Lastly, please do not alter any sections of the data form. The formatting and formulas must remain consistent for all data submissions. Next, we will review block A. In block A, you will enter data on the number of students served, and the numbers of students achieving project objectives items from block A are used to calculate performance measures and efficiency measures. In the green boxes at the top, please enter your grantee name, PR number, and grant year. In the turquoise boxes, please enter your data. If you are not reporting data, please enter a zero into the cell. This zero serves as confirmation that you did not intend to enter data. Please note the different requirements for HEP and CAMP reporting. This is a partial screenshot of the HEP data form for HEP. You are reporting high school equivalency (that is, HSE) retainers, and for CAMP, you are reporting first year academic year completers. At the very bottom of block A, you'll see a turquoise box, and in that turquoise box, which is circled in red, please enter the actual annual award amount. This is the amount that is found in the grant award notification, known as a GAN.

- Stein, Jessica 54:20
 - We find that not entering the amount into the cell is a common submission error. It can be difficult to see due to its location on the form, so please be sure to scroll down after you have entered all data into the turquoise cells.
- Stein, Jessica 54:36

Performance measures one and two, which are formerly known as GPRAs (but you'll still see GPRA on this form) and the success efficiency ratio will automatically populate. Next, we will transition to an activity. As noted in the instructions at the top of this activity, this portion of block A contains three discrepancies. We'll take a few minutes to identify these discrepancies, so please look carefully at this table and form block A and try to identify those 3 discrepancies. And then when you have the answer, just hold on to it, and then I'll share next steps with you in a couple minutes.

- Stein, Jessica 56:46
 I'm going to resume here. I know I said I would wait a couple minutes, but I'm assuming that some folks have answers, so I want to give you a chance to either respond in the chat or raise your hand by clicking on the hand emoji. Katrina, do you see any answers in the chat? Do you see any raised hands?
- Ballard, Katrina 57:14
 I don't yet.
- SJ Stein, Jessica 57:16
 OK. Alright, I'll give you some more time.
- Ballard, Katrina 57:22
 I do see a raised hand, a couple raised hands, so I'll just go in the order in which people raise their hand.
- SJ Stein, Jessica 57:25 OK.

- Ballard, Katrina 57:31
 - So, starting with Gabriela. If you could unmute, you can go ahead and share.
- GE Gabriela Encinas 57:39

 Yes. So, on the note, it says that in the original application, the number funded to be served is 35 students. So, in A1A, they put 40. I think that should be 35.
- SJ Stein, Jessica 57:55 Yes, you are correct Gabby. Thank you so much for participating.
- Ballard, Katrina 58:04
 Sorry, Jessica. You broke up a little bit. Can you repeat that?
- Stein, Jessica 58:09
 Yes. Oh, yes. Thank you, Gabby. That is correct. Thank you. Thank you for participating. Can you hear me now?
- Ballard, Katrina 58:18 Yes. Yep. Great.
- Stein, Jessica 58:20 OK.
- Ballard, Katrina 58:20

 And we have a couple other hands, too. Jessica, we have Irma next.
- Stein, Jessica 58:25 OK. Yes, Irma.
- OK, so A1B1 should be 35. It says that there were no reported persisters, so that should be 35 new participants.
- Stein, Jessica 58:54

Yes. Last year, the grantee reported 0 persisters. So that means that, as you said, Irma, there would not be any returning participants. So, that number under returning participants should be 0, right? But then of course the question is, have they actually served? Are they actually serving 35 students? Could it possibly be 34? What is the actual number? But we do know, based on the information provided, that a zero should be entered into A1B2 if in fact that is the correct number of returning participants and there were zero persisters.

- dePrieto, Irma 59:32
 That is correct.
- One thing I do want to note though is that, sometimes, there are instances in which, there should have been one persister reported, and zero were reported. So perhaps that number for the previous year's APR should be corrected, so that would be another possibility. And is there a third hand raised, Katrina?
- **Ballard, Katrina** 1:00:02 Yes. Yes, there is Jamie Lee.
- SJ Stein, Jessica 1:00:03 OK, three.
- Ballard, Katrina 1:00:05

 And there's also a couple of chats, but I'll have Jamie Lee share, and we can check the chat, too.
- SJ Stein, Jessica 1:00:11 OK, great. Yes, Jamie.
- Jamie Lee Mitchell 1:00:20

 OK. I'm in the A2 section. There are 36 when there should only be 35. So, one of those numbers is reported incorrectly.
- Stein, Jessica 1:00:33

Yes, that is correct. So, if you add the total number of completers, withdrawals, persisters, you get a total of 36, right? And so, there's a discrepancy between what you said, Jamie, that area, that section and that 35 that were reported. So, thank you so much. You got all three and so, I know, Katrina, you said there's something in the chat. Are there any answers there?

Ballard, Katrina 1:01:05

Yes, I think everyone who raised their hands covered it, and the folks in the chat are agreeing. So, I think I think we're good, yes.

Stein, Jessica 1:01:13

Oh, good. Glad to see there's agreement. Thank you so much. So, now we're going to look at the solution, and of course, you answered it correctly, so I've circled the three problematic areas in that solution, and now I'm going to move to the next slide. So next, we will transition to the block B tab. In block B, you are reporting student participant information. This is a screenshot of the CAMP data form. Both HEP and CAMP projects report the number of students receiving instructional and financial services. HEP projects report total instruction hours received by all HEP students and attainers. CAMP projects do not report total instruction hours. Instead, they report referral data. For example, CAMP projects report the numbers of students referred from MEP, HEP and NFJP, and other programs. If a student was referred by two or more programs, please select one referral category for the students. Each student should be only counted once in that referral section. Please avoid reporting duplicate data, and in the next slide, we're going to focus on Block C, and this is where you will report the project services information, and this slide includes a screenshot of HEP's Block C tab. HEP staff report data on the numbers of commuter and residential students. Please note that both commuter and residential students could be taking online classes. HEP staff also report the languages provided, the type of institution (that is, two-year or four-year institution or nonprofit), and which HSE assessment the project is using.

Stein, Jessica 1:03:10

The next slide includes CAMP's block C tab. CAMP staff also report the location (that is, commuter or residential) and the institution type. Additionally, CAMP staff report the academic calendar year (that is, semester, quarter or trimester and SAT and ACT

scores, if applicable, of course). The next slide includes block D, and block D is identical for both HEP and CAMP in section one. Please enter your program objectives as stated in your approved application and the corresponding performance measures and outcomes for each objective. For each objective, you may need to report multiple sub-objectives. Outcome should reflect your project's progress as of June 30, 2023. Please be descriptive and provide data to describe your outcomes. If you have more than five objectives, please enter your information for these additional objectives into the box. For objective 5, you are unable to add more rows to this tab, so that's why we're asking that you use objective 5 for any objectives beyond objective 5, so that that includes a sixth objective or seventh objective. You will input that into objective 5. Now, we'll review Section 2 of block D, so if you scroll down, you'll see that this section only pertains to projects in their final year. The outcomes should reflect your project's progress as of the end of your grant project. Please be descriptive and provide data to describe your outcomes. Lastly, we will review blocks E and F. You will report financial information in block E. Column A of the budget table includes the proposed carryover. This is the amount you have carried over from the previous year. Each dollar amount in this category must be positive and accurately reflect how much carryover you have remaining. Column B includes the recommended amounts. The sum of these recommended amounts must be your annual award amount. The cell for the sum is circled in red, and as noted earlier, this is the actual annual award amount found on your GAN and reported in block A. Column C includes your total approved and revised budget amounts. This column is the sum of your carryover and recommended amounts that is automatically calculated. You do not input any data into this column. D includes your actual expenditure amounts. This is what you actually spent in 2022-2023. The indirect cost total must be no greater than eight percent of your total direct cost total, and the total expenditure amount must match the amount reported on your cover sheet. The cell for the total expenditure is circled in red and cannot exceed the total amount in column C. Please consult your budget office to ensure accuracy, and as noted earlier, please check your reported amounts carefully for accuracy and enter zeros into any blank cells.

Stein, Jessica 1:06:26

In Block F, which is located below the budget table, you will see the two optional prompts listed on this slide. Provide responses to these prompts if they apply, or if

you would like to provide further information or explanation. Now, I will turn it over to Katrina for a review of important dates.



Ballard, Katrina 1:06:48

Thank you, Jessica. And to close out, we'll review important dates and next steps. And of course, we will have time for questions. So, in the next slide, you'll see some important dates for you to remember to mark your calendar. APRs are due on Thursday, November 9, 2023. The OME team will review the APRs for accuracy and completeness between November 2023 and February 2024. Then, the OME team provides feedback in an email to grantees. Based on this feedback, grantees must resubmit required performance data to OME within five business days of receiving the email. And the next slide. The OME team will then review the revised APR for accuracy and completeness in January of 2024, and then we'll be providing feedback in an email to grantees in February 2024. Then again, based on that feedback, grantees must resubmit required performance data to OME during the second revised submission 5 business days after the email. Next slide, please. So, we'll briefly review the interim performance report in the next slide. So, the interim performance report, or the IPR, is for new projects (the FY23 cohort) and those that were notified by OME in the spring of 2023 that their project did not make substantial progress for FY21-22.



Ballard, Katrina 1:08:39

The due date for IPRs is February 8, 2024, and the reporting period is a seven-month period from July 1, 2023 to January 26, 2024. The final version of the IPR must be submitted by Thursday, February 8th. More details will become available in the coming months, so please make sure that you are receiving and reviewing listserv messages. Next slide, please. To submit your APR, your IPR, and any final performance reports, you'll please email two attachments. One attachment will be the performance report data form, which is Microsoft Excel, and the other is the cover sheet, which is a Word document.



Ballard, Katrina 1:09:35

You'll attach both of those to one email and send it to <a href="https://neceive.necei

reports, please make sure that you use the PR number for your project and your institution's name in the subject line of the email. Again, the APR itself will be composed of the two files, the performance report data form, which is an Excel spreadsheet, and the cover sheet, which is a Word document. Each of these files should be saved and attached using a new naming convention that includes your PR number, name of your institution, and 2023, each separated by a period or a dot.

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Ballard, Katrina 1:10:33

You can see the example on the screen. This naming convention is really important. It helps you and us keep better track of our emails, since many grantees have multiple grants and sometimes APRs, IPRs, and final reports can get mixed up. Please make sure you're using this. If you're not using this naming convention on your files when you submit your files to us, we may ask you to update and resubmit the file names, so please make sure you take a look at this slide when you're saving the file. Next slide, please. So lastly, we will have optional office hours on Wednesday, October 11th from 12:30 PM to 2:30 PM Eastern Time. More details will be shared soon, but please join us. It's optional, but if you have any questions or want to go over anything that we talked about today, please feel free to join us. And now, we will turn to some questions.



Ballard, Katrina 1:11:42

If you have any questions, you can enter them in the chat. You can feel free to raise your hand if you'd like to ask your question verbally, or if there's any slide you want to go back to and go over.



Ballard, Katrina 1:11:56

Now, is a good time. Please feel free. Jessica, if we don't have any immediate questions, we can go back to....OK, I see a couple of questions that just popped in.



Ballard, Katrina 1:12:20

So yes, we will be sharing the slides and materials after this meeting. So, you definitely should already have a copy of the slides, but we will just be sending another follow-up. And I've seen a couple requests to go back over a couple of slides, so I think we can go ahead and pull those up. While we are pulling up the slides, we'll make sure to go back.

- Ballard, Katrina 1:12:44
 - I also see somebody has their hand raised. Jamie, did you want to ask a question? Maybe not.
- Jamie Lee Mitchell 1:12:54
 I was.
- Ballard, Katrina 1:12:55 OK.
- Jamie Lee Mitchell 1:12:55

 I was just going to ask on the cover sheet and the data form, should the cover sheet be PDF'd and should the data form remain in Excel?
- Ballard, Katrina 1:12:55 Oh, go ahead.
- Stein, Jessica 1:13:07
 I can take this. The cover sheet should be PDF'd, and the data form should remain in the Excel format. That is correct.
- Jamie Lee Mitchell 1:13:17

 OK. Thank you. I just wanted to verify.
- Yes, thank you for confirming, and I'll screen share the slides in a little bit. I just want to take some more questions that I see coming in. I think I saw another hand raised, but I think it went down. Gabby?
- GE Gabriela Encinas 1:13:38
 Thank you so much.
- SJ Stein, Jessica 1:13:38 Hi, Gabby.

- GE Gabriela Encinas 1:13:39 Hi, Jessica.
- Stein, Jessica 1:13:39 Yes.
- Gabriela Encinas 1:13:41

 So I wanted to ask you, ladies, and of course, other directors that are here as well. But if I have a student that is a new student, and they did not complete their 24 units. So, for all intents and purposes, they might be a persister, and upon that the next year, be a returning student.
- Ballard, Katrina 1:14:01 Yes.
- Gabriela Encinas 1:14:07
 They're currently not enrolled in 24 units as a returning student. Can we count them, even though they're not at 24 units? I know as a returning student, they should be at 24 units, correct?
- Ballard, Katrina 1:14:30

 Though we may want to, we may want to talk with you about the specific situation because it sounds like there may be some specifics.
- GE Gabriela Encinas 1:14:35 OK.

Ballard, Katrina 1:14:38

So if you wouldn't mind reaching out to us, we can talk over any specific situations over email because just to explain a little more, I do know that we have a minimum requirement for what we consider successfully completing the first academic year, but some institutions of higher education also have their requirements as well.

- GE Gabriela Encinas 1:14:38 Yes.
- Ballard, Katrina 1:15:04

 So, if you have any questions about anything like that, it's usually best to just shoot us an email, and we can help make sure that you're counting them correctly and categorizing them directly. Yes?
- GE Gabriela Encinas 1:15:14

 Correct. Yes, and I think I didn't explain myself. They weren't returning as full-time students, but I'll definitely email you with the specifics, so thank you.
- Stein, Jessica 1:15:23 Yes.
- Ballard, Katrina 1:15:23 OK, perfect.
- Ballard, Katrina 1:15:24

 And that was a great summary, too, of a persister becoming a returner.
- Ballard, Katrina 1:15:29
 So, definitely what you've described there sounds right, but we'll definitely connect on that. And Jessica, did you have something to add?
- Stein, Jessica 1:15:37

 Yes. And Gabby, you know, we work closely together, so please feel free to email me. I'm happy to respond to your question about that particular scenario.
- Ballard, Katrina 1:15:51

 Great. OK. And so, I think that there were a couple of requests to go over some of the specific slides, so we can pull that up. I'm also seeing a question about in block B1.b, do I need to put the number of hours for each student or the overall number of

hours we offer per year? I'm guessing that's for HEP, but it might be helpful to also pull that up, so that we cannot look at it together.

Stein, Jessica 1:16:26

Yes, that's a good idea. I'll start with a screenshare of the second slide for HEP, and then I'll share some other slides. So, because I won't be able to see the chat while I'm screensharing, just let me know which slides I should be showing. OK?

Ballard, Katrina 1:16:47

OK. Yes, that's fine. Yes, let's start with what you said. We've got a few questions about this, so let's start with what you said about second slide of HEP. So, that would be, I believe the numbers served. So, for whoever was asking about this, if this was not the slide that you meant (this is slide #15 – number served), feel free to let us know. OK. So, we're going to get that pulled up.

- SJ Stein, Jessica 1:17:19 Going back to 15.
- **Ballard, Katrina** 1:17:21 Yes, number served.
- Stein, Jessica 1:17:23
 Almost there. OK, number served.
- Ballard, Katrina 1:17:27

Ballard, Katrina 1:17:50

OK, great. So, I'll just go over this again, and if there are any other questions, please let me know. So, the number served is the number of students that you're serving, so that's different from the prior slide. Jessica, actually, if you could just back up one more, I just want to make this clear. So, the number funded to be served is the number in your approved application.

That's the number you are approved to serve in your application. So, that's the number you want to get from your application. On the next slide, the number served for HEP would be the number of HEP (high school equivalency) eligible students who

completed intake and were enrolled and attending HEP high school equivalency instruction for at least 12 hours of instructional services in this reporting period or who were enrolled for the sole purpose of taking the HSE assessment in the reporting period. So, this is the number of students that you are actually serving. The previous slide was talking about the number that you're funded to serve. So, when you are reporting both of those numbers, you want to make sure that you understand the difference between the two. If there are any other questions about that, please feel free to just put that in the chat or unmute yourself and ask any clarifying question on number served perhaps.

- SJ Stein, Jessica 1:19:03
 Where should we go next?
- Ballard, Katrina 1:19:04

 OK, great. So, now I'm seeing a question about Block B financial support, so we can advance to that.
- Stein, Jessica 1:19:16
 I'll advance to block B.
- Ballard, Katrina 1:19:20
 And if slide 49 is what I'm seeing, I think.
- Stein, Jessica 1:19:24 Thank you.
- **Ballard, Katrina** 1:19:29
 You want to go over this one, Jessica?
 - Yes, I can do that. It's a little hard to see the screenshot, but if you look at the form that we shared, you can see, under B1B and this is for CAMP, you're going to count the number of CAMP students serviced with the following types of financial services. And it says here that students may appear in more than when row if they receive more than one service. So, there can actually be duplication here, right? So, a student

could have received stipends and room and board or student could have received career-oriented work, study books and supplies, and tuition fees, plus stipends. So, multiple categories can apply. Does that address the question in the chat? Feel free to unmute yourself if you have a follow-up question.

Ballard, Katrina 1:20:37

Yes, I'm also seeing while we're while we're waiting for that, I'm seeing for this section here question about vouchers.

Ballard, Katrina 1:20:48

So, I'm not sure if we want to address that now or if we want to address that, if we want to take that offline. But the question is for GED vouchers. Does that go under financial support, stipends, or other financial support?

Stein, Jessica 1:21:04

Yes, that's a good question. Traditionally, grantees have used the stipend training stipend line item. But there could be a rationale potentially for another category. So, I recommend that you know you consult your program officer just to confirm you know whether you're using the right category, if your justification for using that category makes sense. I hope that addresses your question. Do you have any follow-ups? And feel free to type in the chat or unmute yourself.

Ballard, Katrina 1:21:46

We do have another question on Block B, but for HEP, I think that it's for HEP.

Ballard, Katrina 1:21:53

So right now, we're looking at the CAMP one, but the question is whether to put the number of hours for each student or the overall number of hours. So, Jessica, I know you don't have that in front of you.

Stein, Jessica 1:22:09

Yes, I can take that question. HEP projects report the total instruction hours received by all HEP students as well as all HEP hours. So, you will see two rows for each one for total instruction hours for all HEP students. That's the cumulative number of hours, so that's if you add up all the hours for every student, and then you're going to also add up the total number of hours for every student who attains an HSE.

Ballard, Katrina 1:22:42

Thanks, Jessica. I also see that Celina has her hand raised.

- Stein, Jessica 1:22:48 No. OK.
- CA Celina Arrieta 1:22:50

 Yes. Hello, I just have a really quick question. I just want to clarify if your institution has both programs, do you want us to submit the APRs in two separate emails one for HEP and one for CAMP?
- Ballard, Katrina 1:23:04 Yes.
- CA Celina Arrieta 1:23:06 Thank you.
- Ballard, Katrina 1:23:07
 Yes, please. Thank you for that question.
- Stein, Jessica 1:23:10

 That's a great question, and I just want to add to that, in your subject line, please include the name of your institution, the PR number, so each subject line will include a different PR number.
 - Ballard, Katrina 1:23:26
 Good question. I think we covered everything. There are a few more questions about sending out the materials, and yes, we absolutely will make sure everybody gets all the materials. Any other questions? And if there's not, I do know we have a couple of recap slides, and we also have our contact information. So, we may want to just bring those up to folks. You will have a copy of those so that you can refer to them, but if you have a question that's very specific, or you want to follow up with us one-on-

one, our email addresses are saved in the slides. Your program officer is a great resource, and then we have a couple recap slides that we can review if there aren't any other questions. Yes, I'm not seeing anything else, Jessica.

SJ Stein, Jessica 1:24:31 Yes.

Ballard, Katrina 1:24:31

If you want to just pull those up, and we could just end with some brief reminders just to make sure everybody's got the information.

Stein, Jessica 1:24:38

Sounds good. OK. I'll do a screenshare. I'm seeing that some folks have to head out.

That's OK. Thank you so much for joining us today. We really appreciate your participation and your questions.

Stein, Jessica 1:24:53
I'm going to do another screenshare, so just one moment. Yes, I'll go over a recap of reminders regarding the cover sheet. So, I'll read these reminders to you or summarize them for you, and we encourage you to review these reminders when

Stein, Jessica 1:25:31

completing your APR.

The first reminder is to check the grant year at the top of the first page. Make sure that it covers the current reporting period, or the reporting period that you're using, which is 7/1/2022 through 6/30/2023. If it doesn't, then you're using an older version of the form. The second reminder is to enter the exact previous and current budget expenditure amounts into Section 8. Sometimes, grantees will enter their award amounts into Section 8. Your Section 8 should only include the previous and current budget expenditure amounts. So, this is how much you actually spent during 21-22 and 22-23, those two fiscal years. The next one is the current expenditure amount in section 8B must match the total expenditure amount that you report in block E of the APR data form, and block E, of course, includes that budget table that we reviewed earlier.

- Stein, Jessica 1:26:34
 - The next one is that the authorized representative must complete Section 12. Both wet and electronic signatures are acceptable, and as noted earlier, the form must be submitted as a PDF. That is the cover sheet, and just a reminder, the data form must be submitted as an Excel form. Are there any questions about the cover sheet recap that I just reviewed? I don't think I see any.
- Ballard, Katrina 1:27:08
 I don't think. Yes, I don't see any.
- Stein, Jessica 1:27:12

 OK, I'm going to transition to the next one, which is the data form recap, and I'm not going to read everything on this slide.
- There's a lot of information here, but just to kind of briefly summarize, remember to enter information into all the cells. If you're not reporting any data at all, enter a zero into the cell, and make sure that you receive "good job" indicators. If there are any "please check" messages, please check your calculations, but don't completely rely on that because you could still get a good job and still have a data error, so make sure that you check your data carefully for accuracy. And also confirm that with your business office as well and other folks you're working with at your institution.

 And looking at block A...
- Ballard, Katrina 1:28:08 I'm sorry to interrupt.
- **Ballard, Katrina** 1:28:09 We do have a hand raised.
- SJ Stein, Jessica 1:28:09 Yes.

- Ballard, Katrina 1:28:11
 - I just want to make sure to flag that, Maria.
- SJ Stein, Jessica 1:28:13 OK. Yes, Maria.
- Me Maria Venegas Escobedo 1:28:17

Well, thank you. I was going to wait until you got to the block letter that I'm referring to, but in reference to Block C, it's particularly the last one, the test information collected. Our institution, San Marcos California, CSM to be exact, collects information from SAT and ACT if the student submits it. It's part of the intake form, but it's not admissions criteria. What we've observed, in the last couple of years, is our students are just not taking those exams. So, what would you like us to put on the reporting document? Do we leave it as zero?

- Stein, Jessica 1:28:51
 - Yes, that's a good question. So, you'll see that you have the opportunity to not enter information there if it's not applicable. So, if it's not something you need to enter, you know you can enter not applicable or zeros you know into those boxes. But we recognize that not every institution is requiring the ACT or SAT, and that sometimes, students will take the test. But it's not actually mandated and there may not be any institutional data as well.
- SJ Stein, Jessica 1:29:24

 Does that answer your question?
- Me Maria Venegas Escobedo 1:29:26

Yes. And just so that I could be clear, is it appropriate to perhaps put, yes, that they do collect it, but then put not applicable because it's not available or would that be a number? And then just put not applicable.

Stein, Jessica 1:29:38

Yes. So, you're saying that they collect it, but is it not being reported or it's not available to you? Yep.

Maria Venegas Escobedo 1:29:47

Or it is collected. If students choose to submit it, if they actually took the exam, right?

- SJ Stein, Jessica 1:29:53 OK.
- Maria Venegas Escobedo 1:29:54

 But in the last year or two, our CAMP scholars tend to just not take them because they're not a requirement. Yes.
- Stein, Jessica 1:30:01

 OK, so I there isn't any data, then I would indicate that it's not applicable because it's not, it's not required, right? So, I think that would be the best approach. Anything, Katrina, that you'd like to add to that?
- Yes, I agree with Jessica on, basically, the question is asking if you're if you're using the scores for the intake process. So, if you're not using them, if you don't have the complete information, then yes, then I just wouldn't include it.

Maria Venegas Escobedo 1:30:37 Thank you.

- Ballard, Katrina 1:30:38
 Thank you.
- Stein, Jessica 1:30:46

 OK. So, I'll just give you a moment to review because as I said, I don't want to read everything, but looking at A through E/F, is there anything here that you would like to go over?
- SJ Stein, Jessica 1:30:57 Any questions?

Ballard, Katrina 1:31:07

I don't see any questions coming in, and also just a reminder, we do have the office hours, so if you don't have a question now, but you start to work on this and you do have questions, this is not the last opportunity. And of course, we encourage you to reach out as well. That next slide is a list of all of our contact information.

Ballard, Katrina 1:31:31

We definitely can talk over specific situations. If you're still not sure about a definition or anything like that, please do reach out and, hopefully, we'll see you all at the office hours coming up and we'll – Jessica and I – will stay for just a minute or two. But I think I think we've covered everything.

Ballard, Katrina 1:31:55

So thank, everyone. Thank you. Thank you to everyone who joined and participated and thank you all so much for all the work on your projects and for submitting this really important data to us. It's very helpful for us to understand all the great work you're doing.

Ballard, Katrina 1:32:30

Yes, we have time for questions, yes.

Orozco-Almeida, Joel 1:32:34

I'm going through my emails, and I might have missed it, but my program is in the first year and I'm trying to find the API, not an APR. Where can I get the API? I believe that's...hopefully, I'm pronouncing that correctly.

Ballard, Katrina 1:32:49

Yes, there's so many acronyms that we have. So, I think you're thinking of the interim performance report, the IPR. We have not sent that yet.

Orozco-Almeida, Joel 1:32:56
Yes.



So you did not miss anything. We only sent out the materials for the APR, the annual performance reports, but for the IPRs, for new grantees, we will be sharing that information soon, and I'm really glad that you joined us today because you're starting to already get a sense of the information that you'll need to collect. So very helpful that you're here, but we will also be sharing more information about the IPRs.

- Orozco-Almeida, Joel 1:33:29

 Awesome. Thank you so much. Appreciate it.
- Ballard, Katrina 1:33:31

 Thank you. OK, if there aren't any other questions, I think we can end.
- Stein, Jessica 1:33:41

 OK. Sounds good. Well, thank you so much. I want to echo what Katrina said. Thank you so much for joining us today. We truly appreciate your participation and your questions, and we'll continue to respond to questions via email and also at office hours. And you know, if you have any questions that you think of right after this, feel free to email us. We're happy to respond and help you with this important work.
- Ballard, Katrina 1:34:16

 Thanks, Jessica, and thanks everyone for joining. Hope you all take care, and we'll talk to you again soon.