



GEAR UP UTAH

Employee Procedure Manual



GEAR UP Utah Contact Information

Main Office Contact Information:

GEAR UP Office at UVU

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Statewide Director

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Statewide Budget Manager

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Nancy Liufau

Statewide Data Coordinator

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Partner School Contact Information:

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USU-Eastern GEAR UP Director

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WSU GEAR UP Director

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Lisa Carr

SJF GEAR UP Director

San Juan Foundation
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Blanding, UT 84511
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Dawna Webb

USU-Main GEAR UP Director

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2063 N 1200 E
North Logan, UT 84341
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Region 1 – Weber State

Program Director- Brandon Flores

brandonflores@weber.edu

Davis School District

North Layton Jr. - Layton

Northridge High School - Layton

Sunset Jr. - Sunset

Syracuse Jr. - Syracuse

Syracuse High School - Syracuse

Weber School District

Bonneville High School - Ogden

South Ogden Jr. – South Ogden

TH Bell Jr. – Ogden

Region 2 – West

Counselor - Jose Morales Diaz

Jose.MoralesDiaz@uvu.edu

Salt Lake City School District

West High School – Salt Lake City

Region 3 – East

Counselor - Cecilia Templeton

Cecilia.Templeton@uvu.edu

Salt Lake City School District

East High School – Salt Lake City

Region 4 – Utah State University

Program Director –

Cache County School District

Green Canyon High School - North Logan

Mountain Crest High School - Hyrum

Ridgeline High School - Millville

Sky View High School - Smithfield

Region 5 – Alpine North

Counselor - Carolyn Emond

Alpine School District

American Fork High School - American Fork

Cedar Valley High School - Eagle Mountain

Lone Peak High School - Highland

Summit Independence High School - Orem

Timpanogos High School - Orem

Westlake High School - Westlake

Region 6 – Alpine South

Counselor - Brian Richards

Brian.Richards@uvu.edu

Alpine School District

Lehi High School - Lehi

Mountain View High School - Orem

Orem High School - Orem

Pleasant Grove High School – Pleasant Grove

Skyridge High School - Lehi

Utah County Academy of Science (UCAS) – Orem

Region 7 – Provo

Counselor - Madeleine Strasburg

Provo School District

Independence High School - Provo

Provo High School - Provo

Timpview High School – Provo

Region 8 – Nebo

Counselor - Zylia López

ZyliaL@uvu.edu

Nebo School District

Maple Mountain High School - Maple Mountain

Payson High School - Payson

Salem Hills High School - Salem Hills

Spanish Fork High School - Spanish Fork

Springville High School - Springville

Region 9 USU-Eastern

Program Director –

Carbon School District

Carbon High School - Price

Helper Jr High School - Helper

Mont Harmon Jr High School – Price

Emery School District

Canyon View Jr High School - Huntington

Emery High School - Huntington

Green River High School – Green River

San Rafael Jr High School – Ferron

Pinnacle Canyon School District

Pinnacle High/Middle School – Price

Region 10 – Wasatch

Counselor - Cathy Cardenas

Cathy.Cardenas@uvu.edu

North Summit School District

North Summit High School – Coalville

South Summit School District

South Summit High School – Kamas

Wasatch County School District

Wasatch High School – Heber City

Region 11 – San Juan Foundation

Director – Lisa Carr

lisa.carr@sifutah.org

San Juan School District

Albert Lyman Middle - Blanding

Monticello High School - Monticello

Monument Valley High School - Monument Valley

Navajo Mountain High School - Navajo Mountain

San Juan High School - Blanding

Whitehorse High School - Montezuma Creek

Wayne School District

Wayne Middle - Bicknell

Wayne High School - Bicknell

GEAR UP Utah FYS

FYS Counselor – Kimberly Barraclough

barracki@uvu.edu

GEAR UP Program Description

[GEAR UP](#) is an acronym for Gaining Early Awareness and Readiness for Undergraduate Programs. It is a seven-year federal grant program that provides services and assistance for low-income students in order to help them successfully graduate from high school and prepare for college.

Grant Objectives

1. Increase academic performance and preparation for postsecondary education for GEAR UP students.
2. Increase the rate of high school graduation and enrollment in postsecondary education for GEAR UP students.
3. Increase GEAR UP students' and their families' knowledge of postsecondary education options, preparations, and financing.
4. Increase GEAR UP students' success in their first year of attendance at an institution of higher education.

Grant Abstract

GEAR UP Utah will implement the proposed activities under a 100% Priority Model in a wide-area implementation covering a service region of over 21,000 square miles. A total of 51 schools within 13 school districts in 13 counties will participate. The majority of these schools and districts participated in the highly successful 2005-11 Utah's Statewide GEAR UP Education Program grant led by Utah Valley University. The number of students and the scope of direct student services has been significantly expanded in this state grant proposal, along with an ongoing comprehensive, outcomes-oriented evaluation governing all project processes and interventions.

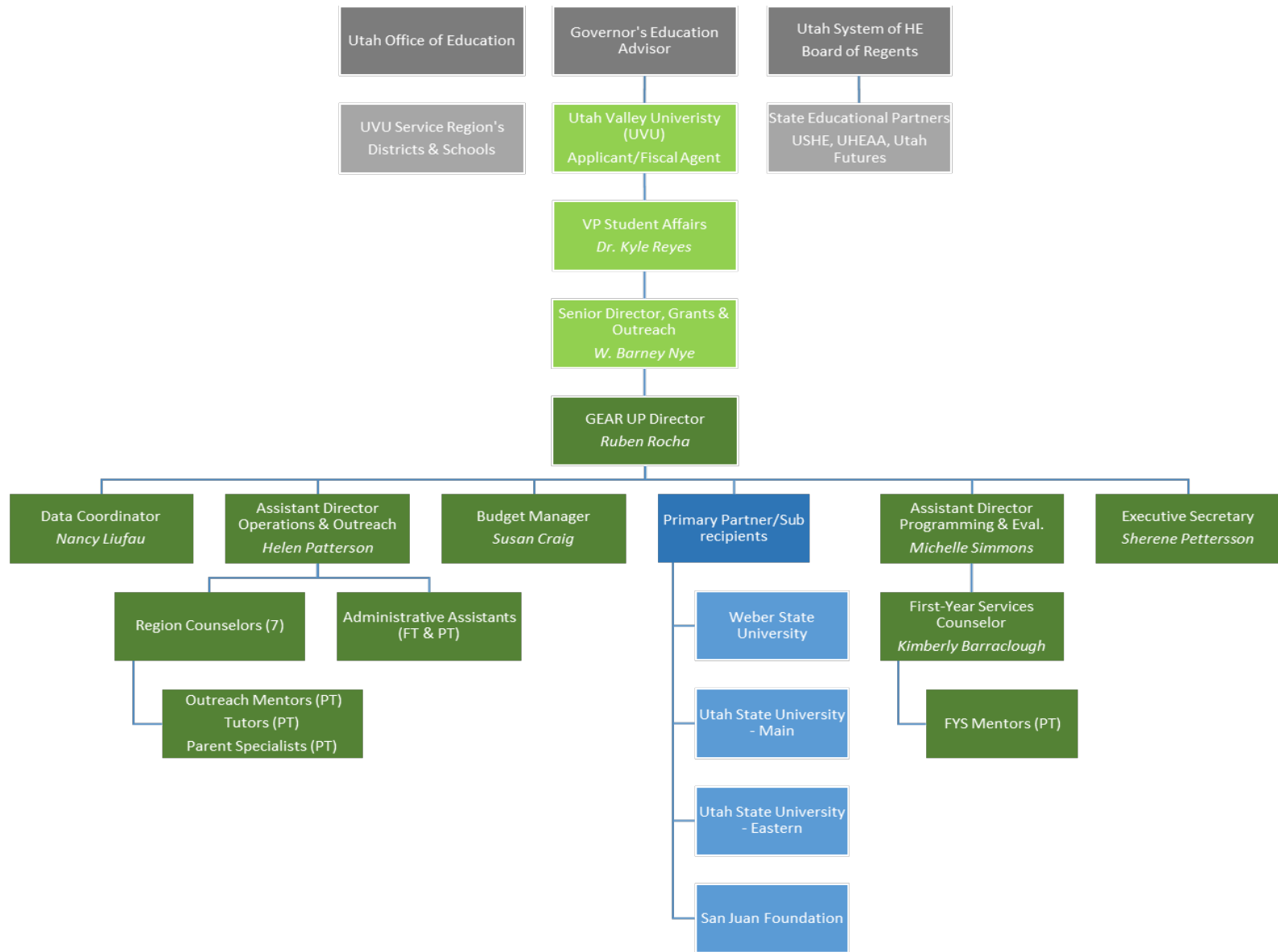
Grant Highlights

- 14,792 secondary students served statewide
- \$26 million for the 2011-18 grant
- \$24.5 million for the 2017-24 grant

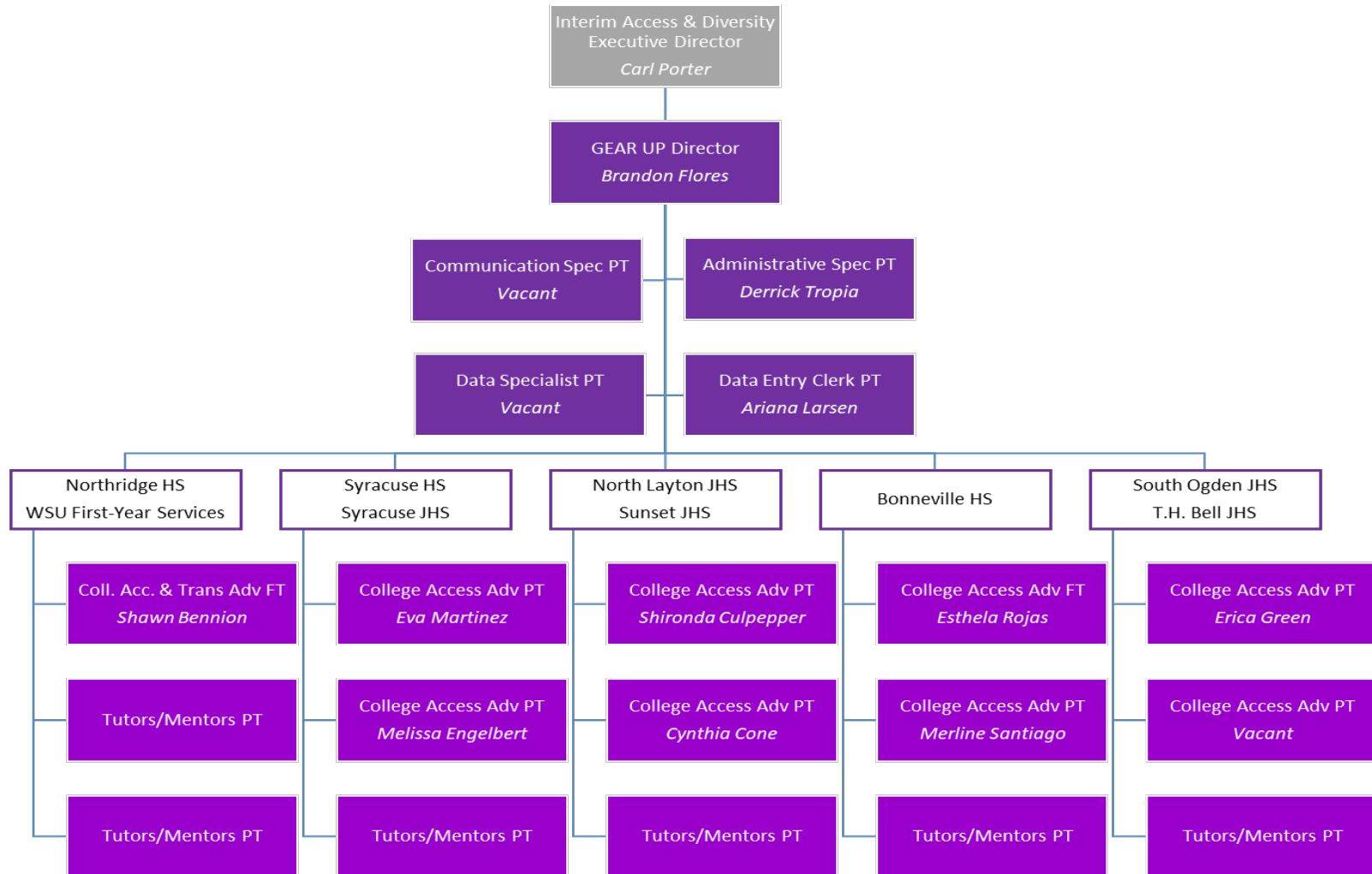
Grant Services

- Tutoring and mentoring
- Academic counseling
- Financial aid assistance
- First-year college support
- Parent and family support
- Financial literacy education
- Increased program evaluation and data gathering
- Encourage rigorous academic studies

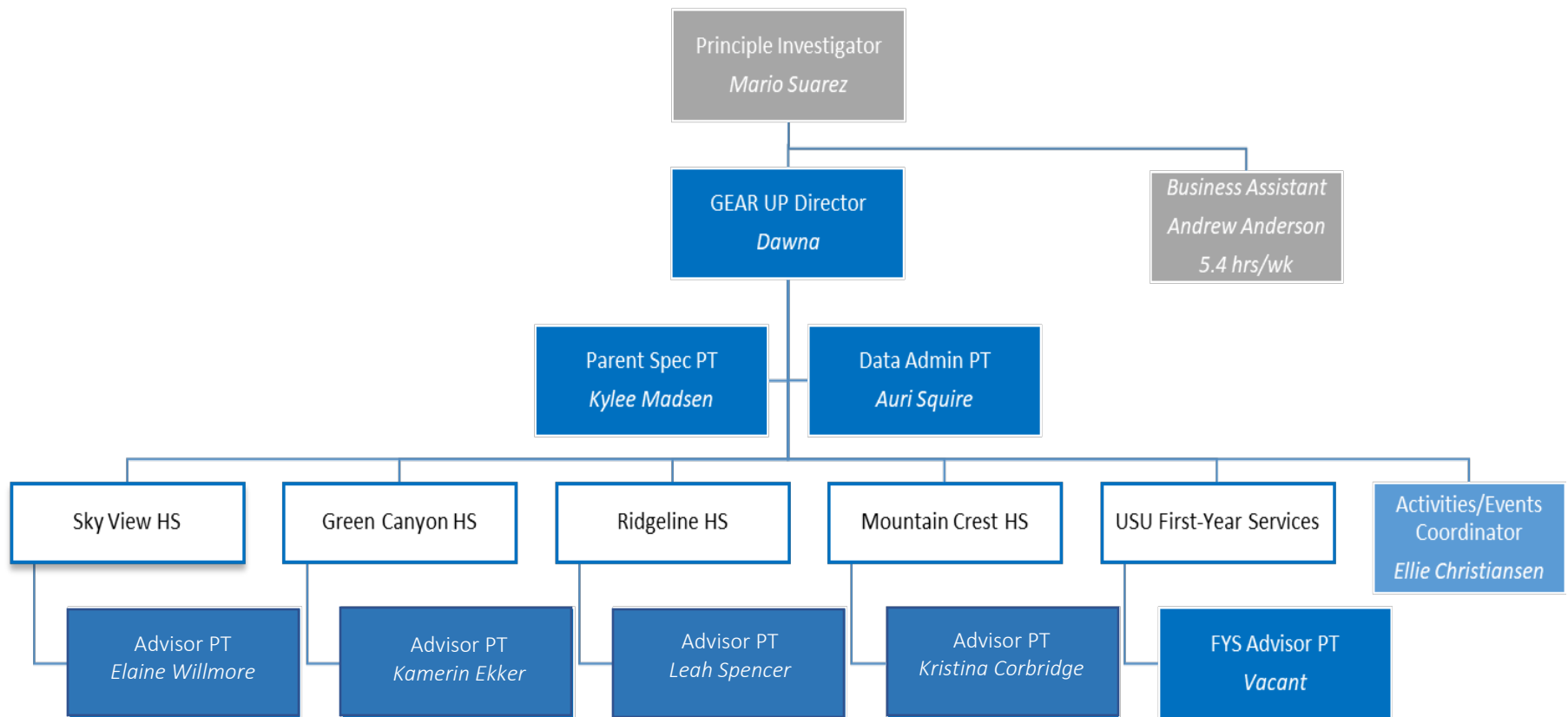
GEAR UP UTAH 2017-2024: ORGANIZATIONAL CHART FOR Utah Valley University



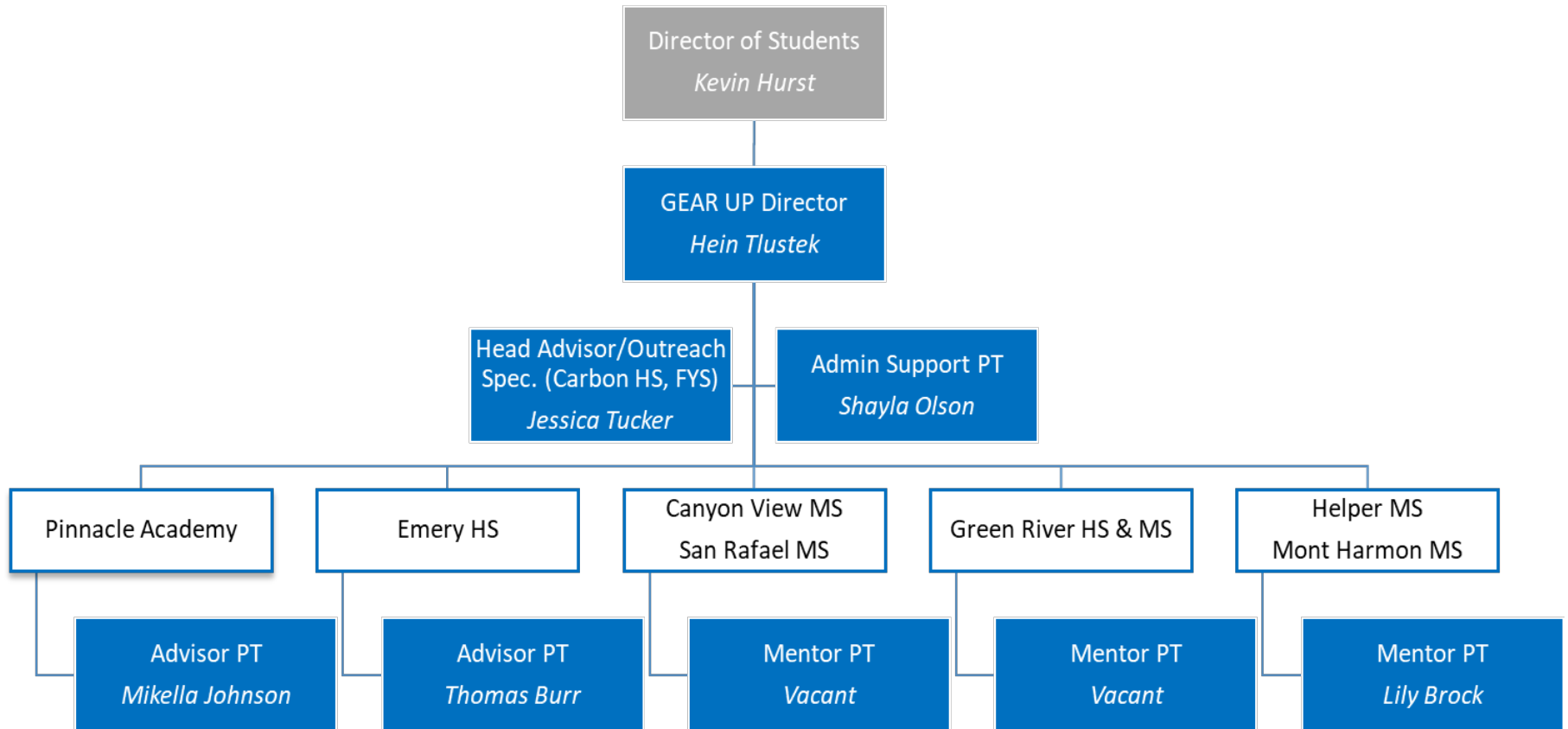
GEAR UP Utah 2017-2024: Organizational Chart for Weber State University



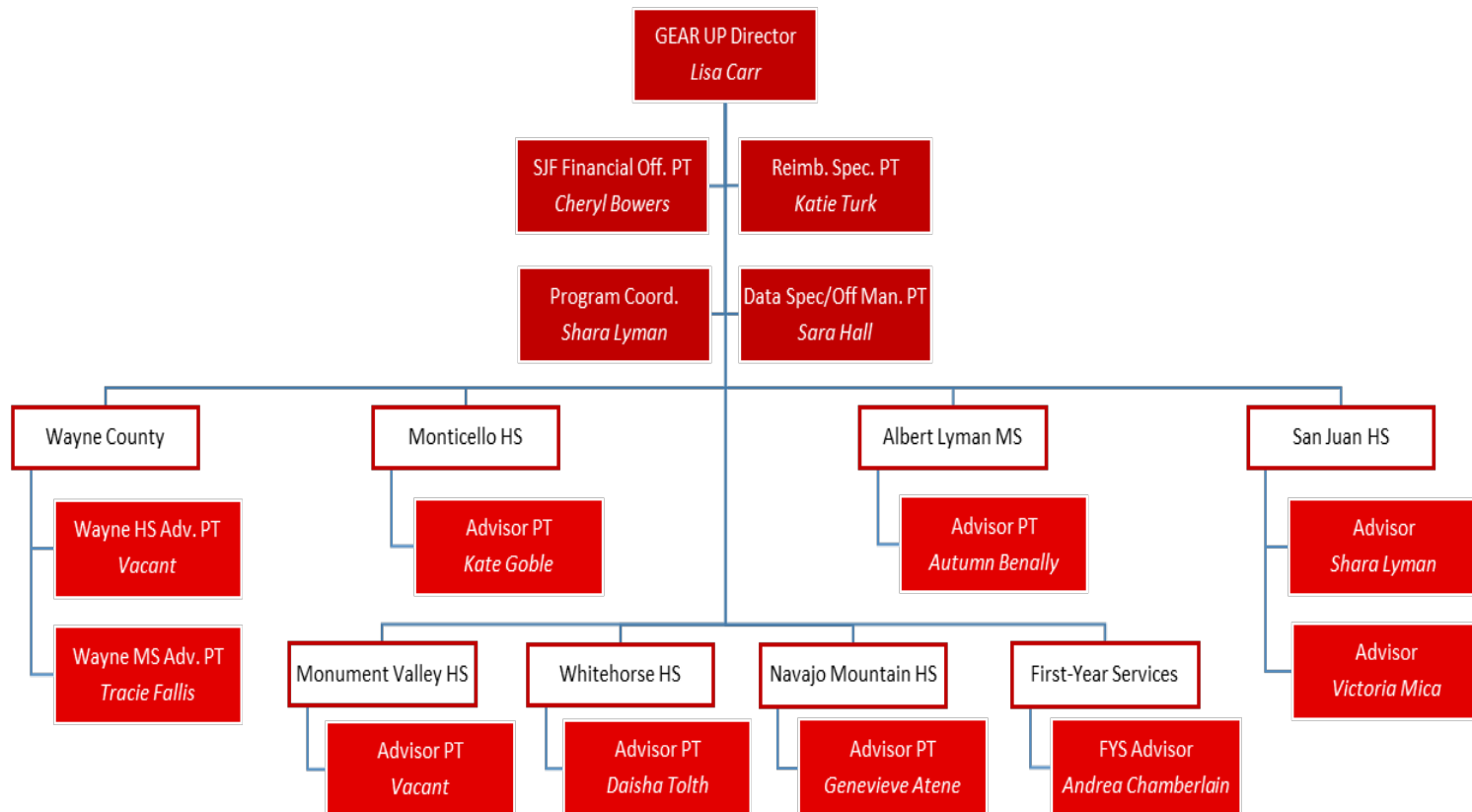
GEAR UP Utah 2017-2024: Organizational Chart for Utah State University - Main



GEAR UP Utah 2017-2024: Organizational Chart for Utah State University Eastern



GEAR UP Utah 2017-2024: Organizational Chart for San Juan Foundation



UVU GEAR UP Main Office Roles

Ruben Rocha, MBA

Statewide Director

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Nancy Liufau

Data Coordinator

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Sherene Petterson

Administrative Assistant

Phone: (801) 863- 6592

Email: sherenep@uvu.edu

Role : Executive secretary, assists administrative team, UVU HR liaison, Conferences, Travel, Event Coordination

Nikki Hunt

Communications Specialist

Phone: (801) 863-5527

Email: NHunt@uvu.edu

Role: Creates marketing materials for UVU GEAR UP. Creates marketing documents such as infographics, flyers, and making updates to the GEAR UP website.

Kimberly Barraclough

FYS Counselor Phone: (801) 863-5528

Email: BARRACKI@uvu.edu

Role:

Program Guidelines

Eligibility for Enrollment

- Students must be eligible for free/reduced-price lunch in order to enroll.
- Students must be enrolled in one of the schools where Utah's Statewide GEAR UP Education Program is located.
- Students must not be enrolled in another Federal Grant program such as TRIO, Upward Bound, etc. (San Juan Foundation is the exception).
- No incentives of any kind can be used to recruit students into the GEAR UP program. This includes candy, food, pencils, t-shirts, or any other items or incentives.

Student Services

Services can begin once the student has completed and turned in an application and will continue until the student has dropped from the program or has continued into their sophomore year of college.

All services/activities must be meaningful and possess an academic value for the students/parents. The term "meaningful" is determined by the defined academic purpose, and that defined purpose must match to grant objectives.

There are several ways to provide services:

- Direct – one on one
- Phone - you can only count the time you speak with a student/parent. If you leave a message you cannot count the time.
- Virtual - this is for online assistance which includes text, emails, and social media. You can only count the time if the student/parent replies back. Please read and sign the [employee statement of acknowledgement](#) to work with minors online.

Employee Procedures

New Employees

(All new employees will receive links to new hire training and checklists from their supervisor)

UVU Employees

<https://www.uvu.edu/hr/new2uvu/>

New Employee Required Compliance Courses

<https://uvu.bridgeapp.com/learner/category/3681>

Title IX and Sexual Harassment

UVU FERPA Training

Workplace Conduct

Conflict of Interest

UVU Cyber Security Training

San Juan Foundation Employees

Please contact the San Juan Foundation GEAR UP Director Lisa Carr at lisa.carr@sjfutah.org for HR Policies and Onboarding Procedures.

USU/USUE Employees

<https://www.usu.edu/hr/new-employee>

WSU Employees

<https://www.weber.edu/HumanResources/new-employees.html>

<https://www.weber.edu/HumanResources/new-employee-toolkit.html>

Leave Policies

UVU Employees

Please visit this link for an overview of UVU leave policies.

<https://my.uvu.edu/hr/employees/benefits/leave.html>

https://www.uvu.edu/payroll/docs/new_employee_tip_sheet.pdf

Full-time Leave Submission Deadlines and Procedures

- For all non-exempt and exempt benefit-eligible employees, leave submission is due every pay period, usually midway through the pay period.

- Sick or vacation leave must be requested approved by your supervisor. Copy Admin.
- Leave must be submitted online at https://tims.uvu.edu/tims/prod/post_apprvg.php

Clock-In/Clock-Out Procedures

- Non-Exempt full-time employees must clock in and out daily in TIMS <https://tims.uvu.edu/tims/prod/timeclk.php>
- In addition, employees must certify their hours weekly, which is then certified by their supervisor and approved. TIMS tip sheet located at:

https://www.uvu.edu/payroll/docs/ft_ne_user_guide.pdf

Conferences Day Leave

- If a full-time exempt employee has attended a conference on a holiday or weekend day(s), that staff member can take off up to two full 8-hour workdays, either right before or right after the employee leaves/comes back from the conference. Full-time employees must report day off as a “conference day” to supervisor and full-time office administrative support.
- Employees should NOT report the conference day on their timesheets.
- Employees still need to receive prior approval from the supervisor to take a certain day off, just as they would for any other type of pre-planned leave.

Schedule Adjustment Time

Full-time employees may adjust their 40-hour week schedule within the same pay period. Schedule adjustments will not be recorded in TIMS, but on our internal leave calendar.

FT employees must receive prior approval from the supervisor to adjust the schedule and have a valid reason.

Examples for schedule adjustments:

- Worked late for an evening activity at a school.
- Missed work due to doctor’s appointment and would like to make-up hours without needing to report leave in TIMS.
- Needing to finish a large project, I remained working after- hours.

FT Employee must report schedule time adjustment to supervisor when full-time leave is due. To work from home, an employee must receive prior approval from their supervisor.

GEAR UP Dress Policy

GEAR UP recognizes that all employees act as representatives of the program and should be dressed accordingly. Proper dress and grooming contribute to the professional image of GEAR UP and how the

program is presented to students, parents, the public, and its associates. GEAR UP establishes an image that projects professionalism and that is exemplary among similar programs and work environments.

All full-time and part-time counseling and office staff are required to abide by the same dress policy. This includes directors, assistant directors, counselors, administrative assistants, advisors, and coordinators.

Guidelines for Suitable Office Attire

GEAR UP's dress policy is **business casual attire during work hours**, attending conferences, work meetings, campus visits, and any GEAR UP- sponsored event. Please note that this policy is in effect for all GEAR UP employees, even if school districts have different policies.

The following policies are expected to be adhered to in the workplace:

- **Slacks and Pants.** Slacks and dress pants/capris that are clean and wrinkle-free are acceptable.
- **Skirts and Dresses.** Skirts and dresses of a moderate length that are clean and wrinkle-free are acceptable. Sleeveless dresses are included.
- **Shirts, Tops, Blouses, and Jackets.** Dress shirts, blouses, sweaters, turtlenecks, and similarly fashioned tops that are considered acceptable attire for work. Sleeveless dress shirts and blouses are included.
- **Shoes and Footwear.** Footwear considered acceptable for work includes: conservative boots, flats, dress heels, loafers, nice canvas shoes, open-toed shoes, and dress shoes that are moderately clean and free of visible "wear and tear".

Guidelines for Suitable Casual College Wear Friday Attire

The following policy is optional for Friday:

- **Pants:** Blue jeans and cargo pants.
- **Dresses and skirts:** Skirts and dresses of a moderate length that are clean and wrinkle-free are acceptable.

Guidelines for Inappropriate Office Attire

GEAR UP's dress policy does include **a casual college wear Friday**. The only time the casual college wear Friday does not apply and business attire is required will be when attending a meeting outside the GEAR UP UVU office or your High School. It's important to always follow a High School's dress code policy, and do not wear another High School/College attire to another High School/College.

- Ripped or untidy clothing, t-shirts, sweatshirts, miniskirts, spaghetti strap dresses/tops, shorts, inappropriately revealing attire, sweats or pajamas, blue jeans, hats, beach flip-flops, tennis and athletic shoes.
- **Shirts, Tops, Blouses, and Jackets:** Collared shirts, GEAR UP shirts and t-shirts, and sweatshirts and t-shirts with high school, college, university logos (UVU, EHS, U of U, etc.).

- **Shoes and Footwear:** Appropriate work shoes including tennis shoes.

Guidelines for Inappropriate Casual Friday Office Attire

Ripped or untidy clothing, miniskirts, spaghetti strap dresses/tops, shorts, inappropriately revealing attire, sweats or pajamas, hats, and beach flip-flops.

UVU/State Cars

State of Utah Policies

Please review State of Utah Policies here:

<https://rules.utah.gov/publicat/code/r027/r027-003.htm>

R27-3-4. Authorized and Unauthorized Use of State Vehicles

- (1) State vehicles shall only be used for official state business.
- (2) Except in cases where it is customary to travel out of state to perform an employee's regular employment duties and responsibilities, the use of a state vehicle outside the State of Utah shall require the approval of the director of the department that employs the individual.
- (3) Unless otherwise authorized, the following are examples of the unauthorized use of a state vehicle:
 - (a) Transporting family, friends, pets, associates, or other persons who are not state employees or are not serving the interests of the state.
 - (b) Transporting hitchhikers.
 - (c) Transporting acids, explosives, hazardous materials, flammable materials, and weapons and ammunition (except as authorized by federal and/or state laws). Otherwise, the transport of the above-referenced items or materials is deemed authorized when it is specifically related to employment duties.
 - (d) Extending the length of time that the state vehicle is in the operator's possession beyond the time needed to complete the official purposes of the trip.
 - (e) Operating or being in actual physical control of a state vehicle in violation of Section 41-6a-502, (Driving under the influence of alcohol, drugs or with specified or unsafe blood alcohol concentration), Section 53-3-231, (Person under 21 may not operate a vehicle with detectable alcohol in body), or an ordinance that complies with the requirements of Section 41-6a-510, (Local DUI and related ordinances and reckless driving ordinances).

(f) Operating a state vehicle for personal use as defined in R27-1-2(37). Except for approved personal uses set forth in R27-3-5 and when necessary for the performance of employment duties, the use of a state vehicle for activities such as shopping, participating in sporting events, hunting, fishing, or any activity that is not included in the employee's job description, is not authorized.

(g) Using a state vehicle for personal conveniences, such as when a personal vehicle is not operational.

(h) Pursuant to the provisions of R27-7-1 et seq., the unauthorized use of a state vehicle may result in the **suspension or revocation of state driving privileges**.

R27-3-5. Personal Use Standards

Personal use of state vehicles is not allowed without the direct authorization of the Legislature.

(2) An employee or representative of the state spending at least one night on approved travel to conduct state business may use a state vehicle in the general vicinity of the overnight lodging for the following approved activities:

(a) Travel to and from restaurants and stores for meals, breaks, and personal needs.

(b) Travel to and from grooming, medical, fitness, or laundry facilities; and

(c) Travel to and from recreational activities, such as to theaters, parks, or to the home of friends or relatives, provided the employee or representative has received prior approval for such travel from his or her supervisor.

(d) Pursuant to the provisions of R27-7-1 et seq., the unauthorized personal use of a state vehicle may result in the suspension or revocation of state driving privileges.

Use of a GEAR UP State Vehicle Procedure

- GEAR UP state vehicles are provided for GEAR UP business use only.
- A valid driver's license and a current state fleet certification are required to use the state vehicles.
 - This is an online training and test. The employee will need to provide a copy of their driver's license to the Executive Secretary to provide to fleet for training.
 - The employee will receive an email with a link for the online training and test. After they have successfully completed the test, please print out a copy of the certification and give the Executive Secretary the certification to keep in their employee file. Once the certification is completed, the employee can then use the state fleet vehicles.
 - Recertification is required every two years.
- A request to receive driving privileges for a GEAR UP state vehicle must be sent to your immediate supervisor copying the Executive Secretary.
- Once requested, your supervisor will review with you the State of Utah and UVU policies and have you sign an agreement to follow all policies when using a GEAR UP state vehicle. This step is **mandatory** before receiving driving privileges.
- GEAR UP Employees using a GEAR UP state vehicle must adhere to State of Utah and UVU Vehicle policies.
- The only exception for a non-business stop would be if an employee is traveling for business purposes and their travel and offsite work combined is over 4 hours. Then they are allowed one stop for a meal at one location in the vicinity of their work area.
- Vehicles are to be reserved or checked out using the vehicle reservation outlook calendar.

- If there is no state vehicle available for Utah county employees, mileage can be reimbursed by submitting a travel reimbursement form.
 - GEAR UP strongly prefers that Utah county employees use a GEAR UP state vehicle.
 - If a state vehicle is available for Utah county employees, but you use your own vehicle, you will not be reimbursed for mileage.
 - Utah county employees must use the UVU campus address as your “starting point.” You cannot use your personal home address as your “starting point” for mileage reimbursement—it will not be reimbursed because it is considered “commuting.”
 - Please talk to your direct supervisor if the GEAR UP state vehicle does not meet ADA or accessibility needs.
- After using the GEAR UP state vehicle, mileage, destination, and purpose of the trip is to be recorded on a log sheet in each vehicle.
 - A log sheet is in each vehicle. Please record every stop on your trip on your log sheet.
 - In addition, you will need to include the purpose for the stops and mileage between stops .
- To fill up the vehicle with gas, you must use the state credit card in each vehicle and use an approved station (e.g. Chevron, 7-Eleven, Circle K, BP Gas, Philips 66, please see Appendix A for a list of gas stations). You can find this list at <https://www.fuelman.com/>. Use your assigned gas pin at the pump. Please leave the tank at least half full after use.
- Part-time employees are permitted to use the state vehicle with supervisor approval and completion of a driving certificate for the following circumstances:
 - Travel to pick up students for events
 - Travel to purchase items for events
 - Travel to employee conferences/training or events
- There is a GPS device located within all state vehicles that track your location and speed. If the driver is speeding excessively in any UVU vehicle, they will receive a warning letter. If that driver speeds excessively again, then they will lose driving privileges for 6 months.
- **Corrective action for any violations of any policies or procedures, or misuse of state vehicles will be determined by your GEAR UP supervisor in consultation with UVU HR.**
- Please refer to the training video and the vehicle glove box, for what to do if you get pulled over by police, get in a car accident, or if the car breaks down.
- UVU Contact: Emily Brown Ext: 8720 emily.brown@uvu.edu
- GEAR UP contacts: GU Director Ruben.Rocha@uvu.edu / Executive Secretary Sherenep@uvu.edu

GEAR UP Purchasing

For any purchases or expenditures of GEAR UP funds, the requestor needs to submit a formal written estimate and submit it to their direct supervisor or the director, if the director is the requestor's direct supervisor, for prior approval.

UVU Policies can be found at:

<http://www.uvu.edu/procurement/department/lpc.html>

Forms of Purchasing

1. (VISA) PCards

PCards are issued by UVU's Procurement office. The program director grants approval for employees to be authorized to have a ProCard. Once you have been approved for a Pcard and complete the training, you will be able to activate your card and start using it. You can view and reconcile your statement through concur.

PCard statement approval process:

3. Requisitions/Purchase Orders

A requisition is a request for a purchase order. Purchase orders are used by the University to place orders. Transactions made using a P-Card or LPC do not require a requisition. All other expenditures start with a requisition. It is against University policy to place an order prior to the creation and approval of a purchase order. Requisitions are not purchasing orders and should not be treated as such.

Ordering/Purchasing Approval

Those making frequent purchases are encouraged, and their position might require, to take the Procurement training from UVU's Procurement office. For more information on UVU's policies visit:

<https://www.uvu.edu/procurement/training/index.html>

1. General Office Supplies

Office supply requests are submitted to the part-time administrative staff over ordering who will compile an office supply list and order from approved office supply retailers through the Wolverine Marketplace. Orders are usually submitted on the 15th and last day of each month. The order will receive director approval through the Wolverine Marketplace before being purchased.

2. Furniture

Furniture is to be requested through the employee's supervisor and the statewide director. After approval for the purchase has been given by the program director the program administrative assistant will work with procurement and then create a requisition order, usually through the Wolverine Marketplace. Keep in mind that furniture purchases take several weeks to process.

Events Request Approval Guidelines

1. Prior approval must be obtained for ALL expenditures of GEAR UP funds for any food or other items for GEAR UP-related activities.
2. Activities and events need to be reasonable, allocable, allowable, necessary and consistent under our grant, GEAR UP regulations, and federal EDGAR cost principles. They also must be consistent with past guidance for our federal program officers, and consistent across the grant and throughout the years of the grant.
3. Based on the guidance regarding a reasonable expenditure given our budget and the needs of the activity, it should be prudent and necessary to achieve the purpose of the activity. On food and beverage, as these are not typically allowable under federal regulations, we have to have an exception by approval, therefore it is expected that we be prudent with those purchases.

Event Request Approval Procedures

- First consult with your direct supervisor about a desired event.
- After consulting with the direct supervisor, the requestor must submit a formal written estimated budget request via email including the cost and event schedule to his/her direct supervisor. It will then need to be sent to the statewide director for final approval.
- Event requests should include:
 - Name of event
 - Date of event
 - Brief description of all event activities, including grant objective that the activity meets.
 - Attendance numbers and types (student, parent, staff, volunteer, guests applicable to event)
 - Food types/cost/ vendor (indicate breakfast, lunch, dinner, or snack)
 - Estimated food cost per person
 - Supplies (if needed) which may include, paper products, advertising materials etc.
 - Travel cost (buses)
 - Total amount requested

- Total average cost of event per attendee
- Requests should be submitted according to the Semester request calendar. Event requests are required to be sent to the full-time administrative assistant prior to each quarter to send for approval from our statewide director. Requests can also be submitted on an as needed basis, always submit at least two weeks prior to the event for approval.
- Once requests are approved, the requester must forward/copy the approval and the request in its entirety to the full-time administrative assistant specifying what tasks the requester would like the full-time administrative assistant to help with and accomplish for the event.
- All events where food will be provided should be academic in nature and be long enough to warrant the need for food.
- All purchases must be tax exempt.
- You cannot spend more than the total amount requested. You can only spend on each participant the amount you requested per person. You cannot request funds for more participants at a higher total cost, and then have fewer participants and spend more per person than is allowed.
- Candy is not allowed to be purchased for students with GEAR UP funds for incentive or academic accomplishments. The one exception is for surveys when candy is purchased with non GEAR UP funds and is only given when both the student and parent surveys are submitted.
- The approved amount per student for meals has changed to the following:
 - Breakfast = \$10
 - Lunch = \$12
 - Dinner = \$15
 - Snack = \$3
- A 10% tip can be included in your purchase, please include it on a line item of your request.
- All leftover food purchased is required to be used for students. If the food is perishable and cannot be saved for future student events, it is permissible to distribute to GEAR UP students first then GEAR UP employees.
- Events held at UVU must be scheduled through 25LIVE and register through risk management at the link below if minors will be on campus. <https://www.uvu.edu/riskmanagement/>
- **All food (snacks included) that is to be purchased for students on UVU campus or UVU owned property must be purchased from Dining services (if over 100 attendees) or vendors on UVU campus (if under 100 attendees).**
- **To purchase food vouchers email your request to dining services and they will bill to our index. Request a receipt and turn in with the event checklist to Admin.**

PBA Approval Requests

PBA funds are non-grant, appropriated funds distributed to our department from UVU for applicable department uses that are not allowable or allocable under the grant. These funds are primarily used for department needs. We use these funds for staff retreats, dinners, part-time staff recognition lunches, bereavement flowers, and other needs.

Any PBA requests should be submitted in writing to your direct supervisor. Requests will be approved upon determination of funds available. Please include in your request:

- Name of event/reason for purchase
- Date of event
- Attendance expected
- Food type/cost/food vendor
- Supplies (if needed)
- Total amount requested
- Total average cost per attendee

Items to be purchased in your request should match the items on your receipt. Try and be specific. If the items on the receipt are different than in your request, a revised approval request should be submitted. Purchases should always be tax exempt. Make sure the vendor is aware before making the purchase.

Overnight Campus Tours Approval Request

Approval requests for overnight campus tours will be included with your semester event requests and should include:

- Name of Event
- Date of Event
- Summary of event
- Attendance Expected
- Registration Cost (May need to be paid with PO)
- Estimated Food Cost/Food Vendor (indicate Breakfast, Lunch, Dinner or Snack)
- Food Cost per person
- Supplies (If needed)
- Travel cost (A PO must be created for any BUSES)
- Hotel Accommodations for staff/driver
- Total Amount Requested

A travel request must be completed in Concur and all expenses for overnight campus tours will be purchased on the supervising counselors travel card except for the Buses. Depending on the campus, Registration may need to be paid with a requisition check if they will not accept the Travel Visa Card.

Work with the Executive Secretary to create a group trip request in Concur. You will also need to receive approval from our VP to use the Travel card for food.

After the trip, a concur expense report will need to be completed, including all receipts, the event checklist and sign in sheets.

Fleet Vehicle Approval

Please contact the administrative assistant III or Fleet directly with requests for renting a fleet vehicle from UVU's fleet department. There are large SUVs and mini-vans available for small groups up to nine people, depending on the vehicle available. Reservations can be made in advance, but approval for the use of funds must be requested from the supervisor via email prior to using the vehicles. Fleet ext: 8720

Bus Rental Approval

UVU Procurement Services has a contractual relationship for Bus Services with Le Bus. School districts can also provide buses if the amount does not exceed \$500.00.

Work with the executive secretary for LeBus quotes and to check availability. If using school district buses, work with your district for costs and availability. Include these costs in your quarterly requests.

Once the request has been approved, a requisition will be submitted and a Purchase order will be created. Procurement Services will then sign the charter contracts with the transportation vendor.

The counselor in charge of the event will need to coordinate with the executive secretary on the final details of the event.

GEAR UP Contact: Sherenep@uvu.edu /LeBus Contact: jenie@lebus.com /UVU Contact: FAUSTCA@uvu.edu

Mailing Requests

For all mailing requests, an email request must be sent to your region admin, copying Nancy. If under 100 mailings it should be requested 2 days before needed. If over 100 mailings it should be requested one week before needed.

For mailing instructions please refer to the guide in BOX

- The requestor must submit a draft of the mailing to the full-time office administrative staff and receive approval from the statewide director before completing the mailing. Drafts should be submitted at least one week in advance of the date needed to begin the mailing.

- If postage is needed, prior approval needs to be requested from the statewide director. Postage stamp usage must be tracked on the mail/postage log form provided.
- Requestor will be responsible to work with administrative staff on the dissemination of the mailing or publication.
- Administrative support will notify the supervisor and director of any additional costs and the size of the mailing and to request additional funds when necessary.
- If outside-department printing services are needed, the requestor must submit the request to full-time administrative support at least five days in advance of the desired printing date.
- UVU Mail services provide bulk mailing services for over 200 mailings.

Printing Requests

For printing needs over 50 copies, an email request must be sent to your region admin and cc' Nancy Liufau nancy.liufau@uvu.edu. Admins will need a 24-hour notification request.

Document Creation

- Any written document used for program purposes, including edits to documents, with the intention of dissemination to GEAR UP staff, students, or parents will need to be revised and approved. Documents should be submitted to full-time administrative staff who will edit/revise the document and submit it first to the direct supervisor, then to the statewide director.
- Any revisions to current documents, including partnership logo changes, will need to go through the full-time administrative staff.
- Any changes to existing policies or created policies must be approved by the statewide director before implemented.
- Once the draft has been fully-revised and approved, the full-time administrative support will notify the original requestor.
- No changes can be made to grant documents without the approval of the Data Coordinator.
- Date and location changes on already approved documents do not have to be approved again.

Data Backup Approval

As of February 1, 2018, UVU prefers that all files on your U://Drive be transferred to UV Box into your "My files" folder.

Permission to edit and or view files in Box will be given to appropriate employees.

If you have any complications accessing or connecting to any of the internal drives contact the Help Desk (x8888) or the Area Technicians (Ryan Scott) for assistance. Do not delay receiving help as your files are not securely saved nor can they be backed up.

Property Inventory

An internal property inventory list should be in place for all equipment items (particularly technology items) purchased with GEAR UP funds. All property should be marked with an identifying label. A master inventory list is kept by the Office Admin III. Property records should include:

- Description of the property
- A serial number or other identification numbers
- Location of the property
- Date of surplus

Equipment and Advertising Materials Check out Procedures

Equipment is available for check out from the office admin III. The checkout policy must be reviewed by any employee checking out equipment. Main contact: Sherenep@uvu.edu

This equipment includes:

- Banners
- Camera
- Cell phones*
- GEAR UP Photo Backdrop
- Label Maker
- Laptops
- Portable Scanner
- Projector
- Rosetta Stone software
- Wavy man

Cell Phone Use Policy

<https://policy.uvu.edu/getDisplayFile/56391d3865db23201153c20d>

If an employee requires a cellular phone in order to perform his or her duties, the employee, with approval of the department head, will obtain a personal cellular access plan and cellular phone and will receive an allowance from the institution via additional compensation, within approved limits. The additional compensation must be justified by business requirements which necessitate the use of a cellular telephone to perform official university business where such business cannot be accommodated by the use of a landline phone, pager, or other less expensive communication device. The cellular telephone is owned by the employee and may be used for personal business. The approved allowance amount must be based on business requirements. The employee may, at their own expense, elect to purchase additional service(s). Approved procedures must be followed when providing additional compensation for this purpose.

Conference Travel Procedure

There are two types of travel at UVU. More information about each can be found by visiting the links below:

1. In-State Travel: <http://www.uvu.edu/travel/type/instate.html>
2. Out of State Travel: <http://www.uvu.edu/travel/type/outofstate.html>

UVU Travel Policies can be found at <http://www.uvu.edu/travel/>

All travel procedures can be found at myUVU CONCUR:

<https://www.concursolutions.com/nui/signin?result=retry&correlationId=d0ac1511-3118-480c-b61f-d7a55b8246c7>

GEAR UP Travel Process Checklist:

- Receive email travel Invitation with approved amounts from Admin.
- A travel request is prepared in Concur and submits for approval
- Once the request is approved in Concur, employee may book travel
- When traveling, keep original receipts for hotel, flight, ground transportation, luggage charges, and airport parking.
- After the return from travel, an expense report should be prepared and submitted in Concur within 10 business days.

- Registrations will be paid by the employee with their travel card.

One-Day Travel: No meal expenses will be reimbursed for GEAR UP related business trips unless an overnight stay away from home is required. The per diem allowance is not intended for those employees whose position regularly requires daily travel within a specified territory. Lunch is the personal responsibility of employees whether at the base location or on a trip. If the one day trip exceeds longer than 3 hours out of the office and the trip is beyond an employee's daily GEAR UP work responsibilities and with supervisor approval, if available, other funds such as PBA or Indirect may be used to cover meals from same-day travel.

Departure/Return Dates v Conference Dates: Employees can fly before/after conference dates are approved as long as they: a) get approval from their supervisor to use leave if it is not during a weekend that they will be traveling b) they pay for their own accommodations before/after conference dates.

Hotel Arrangements: Employees can book their rooms as soon as their travel request is approved in Concur. Employees are responsible for booking their own hotel room with their UVU travel card either through CONCUR or on the conference website. Conference hotel arrangements should be booked as soon as possible as space is limited and reduced rates are available on a first-come-first-serve basis. The conference websites will include which hotel the conference is being held at; if a conference is not held at a specific hotel the website will include hotels in the area. If the hotel is full, employees must book a hotel near the conference that is within the same price as the conference hotel or under the approved amount. Employees must book the least expensive room, if that room is no longer available, they must look for comparable rooms at other hotels. An approved hotel room rate along with a deadline for booking your hotel will be included in the email sent prior to travel. Any hotel expense over the approved amount must include a justification on the expense report. Personal expenses such as room service or room upgrades will also be paid for by employees. Employees may bring a spouse or guests to stay in the hotel room, some hotels it will be free, but some may charge a fee if so it is the employee's responsibility to pay the additional charge. Meals, airfare, luggage, transportation to/from hotel, etc. are not paid for by GEAR UP for guests of the employee. Employees cannot hold off purchasing flights/hotels past the assigned deadlines if they are waiting to see if guests will be attending.

Meals: Meals will be paid for by the employee (traveler), receipts for meals are not required. The amount granted by GEAR UP and UVU will be listed on the CONCUR travel request report. GSA Meal Guidelines are used: <https://www.gsa.gov/>. It is required that we eat the meals provided by the conference. Meals that are not provided by the conference/meeting/event attended will be reimbursed by listing them on the CONCUR expense report.

Flight Arrangements: Employees can book their flights as soon as their travel request is approved in Concur. An email will be sent to travelers to notify them of the approved flight dates and prices and a deadline for booking flights as prices may increase. Any flight expense over the approved amount must include a justification included in the expense report. As soon as their travel request has been approved in Concur, employees are responsible for booking their own flight with their UVU travel credit card on CONCUR. Please provide your flight preferences, your name as it appears on the picture ID. Once your

air travel has been booked you will receive a copy of the card transaction and itinerary in your CONCUR expense list. PLEASE REVIEW IT AS SOON AS POSSIBLE FOR ACCURACY. There is a window of 24 hours from the time of booking to correct any issues. We can never book a business class and must always choose the least expensive flight option within reason.

If you should choose to drive to the conference, you can only request reimbursement for mileage and parking equal to the typical cost of airfare, booked early, paid by one attendee (if multiple staff travel together) from our program. Check with Concur before travel, they determine how much this will be. Gasoline reimbursement is not included.

Travel To/From Airport and Airport Parking: Two round trips for traveling to and from the airport is included in a travel request if someone is dropping them off and picking them up. Or they can have one travel to/from airport mileage request and airport parking if they park their car at the airport. Employees will only be reimbursed when using economy parking (right now \$10/day). The receipt for airport parking must be included in the Concur Expense report. If the employee lives further than UVU, they receive reimbursement for 90 miles for a round trip. If they live north of UVU, they receive reimbursement for their round-trip mileage per Google maps.

Conference Area Transportation: This expense is for shuttle/taxi/public transportation to/from their hotel rooms. If a free shuttle is available from the hotel, the employee (traveler) may not request reimbursement for transportation. Employees must take the least expensive transit within reason (if the public transportation is out of the way and is hard to be accessible it is ok to take a taxi or shuttle such as Super Shuttle). If you exceed the approved amount for ground transportation, please include comments on your expense report as to why you are over the approved amount. Super Shuttles are typically the least expensive and taxis are generally more expensive. Employees must submit their receipts for reimbursement.

If an employee shares the same shuttle or taxi with other employees and pay for all of the employees in the transit, it must be GEAR UP employees within our regions (we cannot reimburse one of the UT County employees paying for an SJF employee or employee from another state grant).

Luggage: We enter \$60.00 for the misc. category in our travel requests as it is Delta's luggage fee for \$30/way. Employees must keep these receipts for reimbursement. Employees may be reimbursed for one checked-in bag under the weight limit (currently 50 lbs) but additional baggage/weight would be a personal expense. Luggage is per way, so an employee cannot claim two bags going to the conference and no bags coming back. They also cannot forfeit this expenditure and use the \$60 for another expenditure.

Rental Car: A rental car expense must be pre-approved by our program director. Employees can rent cars for sightseeing outside the conference, but Travel does not arrange nor reimburse this.

Travel delays or problems: Contact your supervisor immediately if you have any travel delays or problems. The extra travel charges incurred will need to be approved by your supervisor. When

arranging alternative travel due to a delay or problem, always try to include the least expensive option available within reason.

New Part Time Hire Procedures for Supervisors

Supervisors must complete Safe Hire Training through UVULEARN before they are able to hire employees: <https://uvu.bridgeapp.com/learner/courses/21384/slide/9738>

New advertisements and applicants can be found at <https://www.uvu.edu/hr/>

Part-time employee policies can be found at <https://www.uvu.edu/policies/>

Pre-Hiring Procedures

- Work with the office admin III to post an advertisement for the position wanted.
- When you have approved the position posting send it to your supervisor for approval.
- Once the job has posted, you may view your applicants at the link above through UVU People Admin.
- Applicants must meet the minimum qualifications in order to be considered for hire. As you review your applicants be sure to move them in the workflow in People Admin.

Hiring Procedures

- Once you have selected an applicant to hire you must move that applicant to “recommend for hire” in people admin. This will prompt HR to send the new hire UVU paperwork and a request for a background check. New hires have 3 days to complete the background check.
- You will be notified from HR that your new applicant’s background check has been completed and they are able to start work. Please notify the Admin that the background check has cleared.
- The new hire must still go to the HR department at UVU to complete the I9. New hires for EHS and WHS can have their supervisors complete the I9.
- Send the selected applicants completed new employee information form to the office admin in order that an EPaf be started.
- Only when the new hire’s Epaf has moved through HR approval will the employee be assigned a UVID and will be able to access MyUVU to use TIMS.

Once Hired

- Once hired, the applicant will review the **employee manual, part-time employee work limit policy,** and Terms and Conditions form with their supervising counselor and complete the training **before** beginning work (applicable to all GEAR UP regions).
- The employee must also complete New Employee Required Compliance Courses:
<https://uvu.bridgeapp.com/learner/category/3681>
 - Title IX and Sexual Harassment
 - UVU FERPA Training
 - Workplace Conduct
 - Conflict of Interest
 - UVU Cyber Security Training
 - UVU TIMS Instructions and tip sheet can be found at
https://www.uvu.edu/payroll/docs/pt_employee_tims_tip_sheet.pdf

Terminations

- **All terminations must be approved by the employee's supervisor, whether full or part-time.**
- Employees should notify the counselor at least two weeks in advance of his/her intention of leaving the program, in order to provide for enough time for the counselor to fill the open position. This policy applies to all GEAR UP employees. The supervisor should then contact their direct supervisor and inform them of the employee termination.
- The supervisor should email the Admin of the date of his/her final day so that the proper termination paperwork can be completed promptly and accurately. This policy applies to all GEAR UP employees.
- Part-time employee positions can be terminated involuntarily by GEAR UP for egregious conduct according to section V of UVU's "Corrective Actions and Termination for Staff Employees" Policies and Procedures manual. Only verbal warnings can be given.

Time and Effort/Weekly Reports

- Part-time Mentors, Tutors, and Parent Specialist employees will track their hours worked using the GEAR UP Time and Effort Report. Time and effort reports should reflect the amount of time they physically spend at the high school or office and detail the work completed. Reports are to be reported from the 1st- 15th and 16th- last day of the month. Completed time and effort reports are to be given to or emailed to the Administrative Assistant III and supervisor by the deadline set in place by UVU's Human Resources (HR).
- Part-time Admins will use a weekly report to track their time and effort submitted weekly to the data coordinator

Part-Time Employee Mileage Reimbursement

- **Travel:** Part-time employees must receive supervisor approval before submitting mileage reimbursement requests. Mileage reimbursement is only available for work-related travel.

