**PEF Impact Grant**

**PROGRAM OVERVIEW 2023-24**

Petaluma Educational Foundation (PEF) administers the **PEF Impact Grant Program** to enable teachers, schools and districts to bring innovative and effective instructional ideas to reality despite ongoing economic challenges. Grants totaling over $4,341,525 million have been awarded to Petaluma area schools since 1983.

PEFgrants support quality instruction, student access and impact, and innovation aligned with a school or district’s overall goals.

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

* **October 2, 2023**: Applications due by e-mail to PEF by 4:00 PM.
* **October 16, 2023**: Applicants notified if they have made it to second round.
* **October 24 & 25,2023**: Second round for finalists. Oral presentations.
* **November 10, 2023**: Awards announced. Selection based on objective scoring matrix.
* **January 15, 2024**: Site deadline for ordering supplies and equipment.
* **April/May 2024**: Site visit and evaluation by PEF Board members and donors.
* **June 1, 2024**: Teacher final evaluation report due to PEF.

**Eligibility for PEF IMPACT Grants**

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

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

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

**SUBMISSION OF PEF IMPACT GRANT PROPOSALS**

PEF Impact Grant Proposals must be submitted according to instructions posted online at **www.PEFinfo.com** or available at the PEF office, 200 Douglas Street, Petaluma, CA 94952, 707.778.5063, **katy@pefinfo.com**.

**2023-24 PEF Impact Grant**

**REQUIREMENTS AND GUIDELINES**

* **Up to $15,000 maximum**
  1. PEF Impact Grants must benefit students and instruction directly and may not be used for support of faculty research, faculty education (unless necessary for the proposed program), facilities improvements, labor, installation/modification costs, ongoing tech support, renewable/replacement/consumable costs or repairs.
  2. While PEF Impact Grants should directly impact student instruction, grants cannot supplant funding typically provided by a school site or district.
  3. PEF Impact Grants will not be used to fund salaries, teacher release time, refreshments or catering, or equipment lists.
  4. Funds granted for equipment, furniture, or technology must be integrated with an accompanying program or project that describes instructional impact on students.
  5. All technology requests must be in line with your site and or District Technology Plan and must be collaboratively planned, reviewed, and approved by the site administrator.
  6. Funds must be used for the specific purposes stated and described within the grant application and broken down on the budget page.
  7. Projects funded by PEF Impact Grants must be fully implemented by May 2023 All orders for supplies and equipment should be submitted through your own district by January 15, 2023.
  8. Periodic written reports and/or on-site evaluations by PEF Board members and donors for PEF Impact Grant projects will be required. Final reports for all projects must be submitted to PEF no later than June 1, 2023.
  9. PEF may share PEF Impact Grant Program updates and images (which may include student-released images) to PEF, our donors, and local and social media.

**2023-2024 PEF Impact Grant**

**Review and Scoring Process**

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

**Round 2 (Presentation):** Applicants who advance to a second round of screening will be required to do a 15-minute oral presentation to the PEF Grant Committee on **October 24th & 25th, 2023.**

**PEF IMPACT GRANT Timeline**

|  |  |
| --- | --- |
|  | **PEF IMPACT GRANTS**  **Up to a 9-month process** |
| **October 2, 2023** | **Grant Applications e-mailed by 4 PM** |
| **October 16, 2023** | **Second Round Finalist notified** |
| **October 24h & 25th 2023** | **Round 2 – Finalist Presentations** |
| **November 10th, 2023** | **Notification to Applicants**  **Initiate PEF Impact Grant projects** |
| **January 15, 2024** | **Place orders with your district.** |
| **April/May 2024** | **Site visit, follow-up, feedback, sharing** |
| **June 1, 2024** | **Teachers’ evaluation due to PEF** |

**2023-2024 PEF Impact Grant Application**

**INSTRUCTIONS**

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**Application Deadline**

Please e-mail application no later than 4:00 PM on**, Monday, October 2, 2023**

to Katy Verke, Program Director, **katy@PEFinfo.com**.

Applications must be typed, well organized, proofread, and include the required components. Additional pages describing or supporting the grant proposal may be attached. Do not submit with Grant Overview

***Handwritten, faxed or late applications will not be accepted****.*

**Please submit application in the following order:**

**(all are Required)**

1. **\_\_\_\_ Typed Cover Sheet** *(do not attach instructions, score rubric, program overview or year-end report page. Application only please.)*
2. **\_\_\_\_ Administrator’s Statement and Signature Form** *(Principal/Superintendent)*
3. **\_\_\_\_ Narrative** *(Read Instructions and PEF Grant Committee’s Scoring Rubric)*
4. **\_\_\_\_ Itemized Budget and Documentation**
5. **\_\_\_\_ Checklist**

**2022-2023 PEF Impact Grant Application**

**Cover sheet**

**(Please Type)**

## **PEF Impact Grant TitlE**

## **Proposal Summary (brief grant description)**

## **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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## **Amount Requested: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Focus Area(s):**

## **School(s) or District Name:**

**School Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

# Lead Contact (responsible for all site communication):

Position/Grade: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone/Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email:

**Alternate Lead Contact:**

# Lead Contact (responsible for all site communication):

Position/Grade: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone/Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email:

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

**2022-2023 PEF Impact Grant Application**

**Principal/LEAD ADMINISTRATOR STATEMENT and signature FORM**

**Note to School Principal/LEAD ADMINISTRATOR**

It is important that you are collaboratively involved in reviewing, if not developing, this PEF Impact Grant application.

**Please prepare** **a statement of need and purpose, of no more than one page, making the case** for how this project supports the goals of your school or district.

**School Principal/LEAD ADMINISTRATOR STATEMENT**

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

**Administrator’s Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Phone/Cell: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Number of students enrolled for current year (2022-2023): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Students in EL Program: **#**\_\_\_\_\_\_\_\_\_\_ %\_\_\_\_\_\_\_\_\_\_\_

Students eligible for Free/Reduced School Lunch Program: **#**\_\_\_\_\_\_\_\_\_\_ %\_\_\_\_\_\_\_\_\_\_

Students in GATE Program: **#**\_\_\_\_\_\_\_\_ %\_\_\_\_\_\_\_\_\_\_\_

Other Relevant Data:

**2022-2023 PEF Impact Grant Application**

**IN-DEPTH PROJECT NARRATIVE**

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

***Each application must include the following narrative components:***

1. **PURPOSE OF GRANT**

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

1. **PROCESS AND TIMEFRAME:**

Please describe how your project addresses these considerations:

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

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

Have or will **other funding, resources**, or in-kind services have been sought for this project? From where, to what degree? Has this been previously funded and, if so, will these funds, resources, or in-kind services continue (e.g., release time, consumable materials, food)?

Please describe **long-term strategies for funding** this project beyond the end of the grant period. (How can it be sustained and/or extended?)

**2022-2023 PEF Impact Grant Application**

**ITEMIZED BUDGET & DOCUMENTATION**

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

**AND**

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

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

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

**PEF Impact Grant Application**

**CHECKLIST**

Please review your PEF Impact Grant application comparing it to the scoring rubric and this checklist. Include the checklist with your submitted application.

* Have you completed your application according to the instructions?  
  *(Attachments or additional pages are acceptable; however, the cover sheet, application narrative, budget, and Administrator’s Statement* ***must*** *be completed and submitted.)*
* Have you included the required approval, signature, and statement from your site administrator?
* Is your grant application typed, complete, proofread, and organized according to the requirements and guidelines of this packet?
* Have you provided a complete description of your project including evidence and examples that address the scoring rubric criteria?  
  *(Applications should include how funds will be used, how many students the project will impact, if the project can be applied to multiple classes, repeated for subsequent class years, and how the project aligns with the goals of the district.)*
* Have you researched and documented funding and/or services available for your project directly through the site or district? Have you researched for the best price? And does your project budget accurately reflect all anticipated expenses for your project?  
  *(Applicants should secure specific price quotes or provide materials that reflect the actual cost of supplies, equipment, etc. Broad price ranges or vague cost estimates are not sufficient.)*
* Have you described how you collaboratively developed your project with colleagues, administrators or other partners?
* If your application includes funds for equipment or technology, have you detailed the instructional program, project, or goals supported by this equipment or technology?  
  *(Applications limited to funding equipment, supplies, tools or technology will not be considered without an accompanying project or program that describes instructional impact on students.)*
* Have you made sure that your application does not include funding requests for salaries, labor, installation, ongoing tech support, release time, refreshments, food and beverage, supplies or catering services?
* Have you re-read your application to ensure your application describes maximum impact, meets PEF criteria, and includes all required components?

**Impact Grant Scoring Rubric**

***SCORING RUBRIC SAMPLE***

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Grant Component*** | **Score 4** | **Score 3** | **Score 2** | **Score 1** |
| 1. **Project Narrative**   *The action plan that describes goals, roles and resources embedded in your project as well as a) the need being addressed and b) the process, strategies, and projected timelines* | **Clearly and concisely describes** how to meet a **specific need showing** **steps of a process, necessary resources and reasonable timelines** | **Describes** how to **meet a need** including a **process, resources, and reasonable timelines** | **Outlines** a **plan** to accomplish **a goal,** **possible resources, and a general timeline** | **Includes** a **goal** and a **plan** with **vague** steps and **undefined** **resources, and/or an unrealistic timeline** |
| 1. **Student Impact, Engagement, and Outcomes:**   *Thoughtful, deliberate planning, delivery, assessment, and analysis of instructional practice that will positively impact student learning* | **Briefly describes specific changes** **most likely** to **positively impact** achievement; **describes how** active engagement **will improve learning**. Provides **examples** of how students will interact with other students or adults. | **Describes changes** that **will** i**mpact** achievement or increase students’ interactions and engagement with knowledge, skills, or others to improve learning | **Lists changes** that **might impact** achievement or increase students’ interactions and engagement with knowledge, skills, or others to improve learning | **Describes** how this project **might change** the classroom, school, or instructional practices, but **fails to link** **these changes** to improved teaching or learning |
| 1. **Sustainability**   *Ongoing funding and technical support that sustains the technology infrastructure, human and digital resources,*  *and staff development necessary for full project implementation* | **Clearly describes** how **funding, technical and human resources** will be used to support the **processes** necessary to implement this project **during and beyond** the grant period | **Describes** how **funding, technical and human resources** will be used to support the **technology** **and/or materials**  necessary to implement this project **during and beyond** the grant period | **Lists** how **resources** will be used to support the **technology or materials** necessary to implement this project **during** the grant period | **Lists** resources necessary to support **materials** required for this project |
| 1. **Organizational “Scalability”**   *Potential to build the capacity of others or the organization to extend, expand, or deepen the positive benefit of this project beyond its initial scope* | **Describes concepts, ideas, or examples** of how this project has **high potential** to be **extended, expanded, or deepened to maximize a positive impact.** | **Describes ideas** about how this project **could be** **extended, expanded, or deepened to increase positive impact**. | **Provides** a **few possibilities or examples** of how this project **might be adapted** to increase a positive impact. | Provides **few, if any, ideas or examples** of how this project could extend impact beyond the scope of the grant |
| ***Grant Component*** | **Score 4** | **Score 3** | **Score 2** | **Score 1** |
| 1. **Professional Collaboration & Development**   *Supports a culture of routine professional collaboration and ongoing professional development and training that integrates and uses this initiative as a seamless instructional tool used regularly by students and teachers* | **Describes specifically how and when** teachers and administrators will **routinely collaborate** **to integrate** this initiative or technology within classrooms, grade levels, departments, or school wide so they can **analyze and adjust** teaching and learning. | **Describes how and when** teachers and administrators will **collaborate** **to integrate** this initiative or technology within classrooms, grade levels, departments, or school wide so they can **discuss** improvement of teaching and learning | **Provides a schedule** of when teachers and administrators **will collaborate to implement** thisproject within classrooms, grade levels, departments, or school wide | **Provides a schedule** of when teachers and administrators will **collaborate** **to implement this project** |
| 1. **Equitable Access & Opportunity**   *Robust and reliable access and opportunity for all to benefit from this initiative and potential to improve teaching and learning for every student* | **Articulates** how **specific** students and teachers, who may not currently have access to this instruction, **will benefit** and **be ensured continuing access, opportunity,** and **advantage** | **Explains** how **specific** students and teachers, who may not currently have access to this instruction, or technology, **will** **benefit** | **Describes** **which** students and teachers, who may not currently have had access to this instruction, or technology, **could** **benefit** | **Describes how** this project’s instruction, or technology **could benefit** students and teachers |
| 1. **Accountability & Progress**   *A collaborative, process that ensures ongoing analysis of this project’s progress, challenges, and potential* | **Describes** a **specific, ongoing process** to **monitor, measure**, and **evaluate** progress and impact based on an action plan and describes **how** and **when** any **mid-course adjustments will be made**, if necessary | **Describes** an **ongoing process** to **evaluate** progress based on an action plan and **describes how** any **adjustments** will be made, if and when necessary | **Explains** how this **project** will **include evaluation** of progress based on the plan and **describes how** **adjustments** **might** be made | **Explains** how this **project** **might** **include evaluation** of progress based on the plan |
| 1. **Budget**   *The itemized breakdown of both direct and indirect costs, include funding, resources, or services covered by other sources beyond the PEF grant* | Accurately and succinctly describes not only the direct and indirect costs of this project, but how funds or resources from other sources will be used to ensure maximum benefit and implementation; reflects thorough and current research & costs | **Accurately describes** direct and indirect costs involved in this project and how funds or resources from other sources **might be used** to **complete or supplement** this project; **reflects** **complete** and **current costs** | **Lists** direct and indirect costs involved in this project and how from other sources **might be used** to **complete or supplement** this project; **appears to reflect** **current costs** | **Lists** direct and indirect costs involved in this project; **appears** **to reflect** current costs; **considers few if any other funds, resources, or services** |