

Staff Handbook 2008-09

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Upward Bound / ETS-Project PLUS Staff Information 2008-09

Name/Address	Title	Office	E-Mail	Phone
Phillip Dirks 11/28 3215 NE 61 st Ave Portland, OR 97213	Project Director Room 203	5-8383	dirksr@pdx.edu	282-0851 (h) 201-1529 (cell)
Catherine Hale 4/10 1005 SW Park, #506 Portland, OR 97205	Office Manager Room 110	5-4458	halec@pdx.edu	223-4192 (h) 515-4398 (cell)
Inez Freeman 12/21 1021 NE Failing Portland, OR 97212	UB Advising Coordinator Room 102	5-4084	freemani@pdx.edu	249-3987 (h) 957-7451 (cell)
Rosalyn Taylor 8/7 7152 SW Manor Way, Unit F Aloha, OR 97007-4224	Language Arts Coordinator Room 201	5-4085	taylorr@pdx.edu	848-3532 (h) 522-7603 (cell)
Jason Young 4/23 2040 SE 139 th Ave Portland, OR 97233	PPS 11-12 HS Coordinator Room 205	5-4460	jyoung@pdx.edu	936-4907 (cell)
Darryl Kelley 8/3 8911 N. Dwight Portland, OR 97203	PPS 9-10 HS Coordinator Room 206	5-4083	dkelley@pdx.edu	754-4038 (cell)
Vicky Sanchez 1/28 4822 SE Kingston Ct. Hillsboro, OR 97123	Hillsboro Coordinator Room 207	5-8382	sanchev@pdx.edu	648-6550 (h) 475-5616 (cell)
Brenda Ramos 2/1 7827 N. Mississippi Ave. Portland, OR 97217	ETS MS Coordinator Room 202	5-5338	ramosb@pdx.edu	971-506-9418 (cell)
Gisela Cory 8/9 0308 SW Montgomery St., #403 Portland, OR 97201	Tutor Coordinator Learning Specialist Room 207		coryg@pdx.edu	227-4681 (h) 957-8532 (cell)

Office 725-4458	Fax Number: 725-8514
ETS Index Code: 231010 UB Index Code: 227810 EEPS Organization Code: 331601	Street Address: PSU / Koinonia House 633 SW Montgomery Street Portland, OR 97201 Campus Mail Codes: UB-ETS
Emergency Phone Nos. 9-911 Campus Public Safety: 725-4404 First Aid PSU Health Sv. 725-2800 Poison Control Center 1-800-222-1222	Billing / Mailing Address: Portland State University PO Box 751, UB-ETS Portland, OR 97207-0751

UPWARD BOUND/PROJECT PLUS TARGET HIGH SCHOOLS 2008-2009

SCHOOL	PHONE / FAX	PRINCIPAL	VICE-PRINCIPALS	COUNSELOR CONTACTS
Franklin High School 5405 SE Woodward Portland, OR 97206	916-5140 916-2694 (fax) 916-5132 (counseling fax)	Charles Hopson L	Jennifer Frentress (curriculum-VP) Van Truong	Wade Langston Hoang Tran Jennifer Martinez
Jefferson High School 5120 N Kerby Portland OR 97217	916-5180 916-2698 (fax)	Cynthia Harris	Ricky Allen, Men's Academy Aurora Lora, Women's Academy	Brian Quinn -School of Arts Don Dixon -School of Science
Century High School 2000 SW 234 th Ave. Hillsboro, OR 97123	848-6500 848-1825 (fax) 848-1814(Counseling Phone)	Ted Zehr	Mary Peterson Don Brown Shelley Corry Martha Cruise	Rodger Will Jerry Taylor Ben Burkhardt Chris Stover
Glencoe High School 2700 SW Glencoe Rd. Hillsboro, OR 97124	844-1900 640-5604 (fax) 693-4038 (counseling fax)	Carol Loughner	Vicky Lindberg (curriculum) Greg Mitchell Rian Patrick	Joe Penna Jacy Schmidt Sabrina Walters Larry Veltrie Brooke Mowry Danica Jensen
Hillsboro High School 3285 SE Rood Bridge Hillsboro, Or 97123	844-1980 693-0645 (fax)	Sloan Presidio	Brandy Byers (curriculum) Todd McKee (administrative)	Josh Miller Marla Lyle Luanne Durdan Melissa Toren Tami Erion Tanya Stremme

Portland Public Schools Superintendent: Mary Jo O'Connor 916-2000 (PPS main number)

UPWARD BOUND/PROJECT PLUS TARGET HIGH SCHOOLS 2008-2009

SCHOOL	PHONE / FAX	PRINCIPAL	VICE-PRINCIPALS	COUNSELOR CONTACTS
Benson High School 546 NE 12 th Portland, OR 97214	916-5100 916-2690(Fax)	Christie Plinski	Alex Otoupal (Administrative) Susan Schenk (Curriculum) Juanita Valder (Vice- Principal)	Leon Mckenzie Ginger Taylor Steve Wren Julie Schlosser
Grant High School 2245 NE 36 th Portland, OR 97212	916-5160 916-2695(Fax)	Joseph Malone	Brian Chatard (administrative) Kim Patterson (administrative) Jeff Spalding (Curriculum)	Megan Schlicker Elizabeth Mahlun Diallo Lewis Tearealle Triplett
Madison High School 2735 NE 82 nd Ave Portland, OR 97220	916-5220 916-2702(Fax)	Patricia Thompson	Roger DeVille (curriculum) Peyton Chapman (discipline)	David Colton, Kelley Shafer Roberta Cooper Kathy Hergert-Knox
Liberty High School 21945 NW Wagon Way Hillsboro, OR 97124	844-1250 848-5851(Fax)	Gregg O'Mara	Gregg O'Mara (Assistant Principal) Andy Croley (Asst. Principal) Mary Peterson (Asst. Principal)	Barb Falconer Patrick Baker Marcia Benedict Melissa Arrigotti
Marshall High School 3905 SE 91 st Ave. Portland, OR 97266	916-5241 916-5243 916-5244	Ed Bear – Biztech Stevie Newcomer –Pauling Academy Fred Locke – Renaissance Arts		Ed Le Baron - Biz Tech Darlene Pope -Linus Pauling Erin Hale -Renaissance Acad.

PROJECT PLUS TARGET MIDDLE SCHOOLS 2008-2009

SCHOOL	PHONE / FAX	PRINCIPAL	VICE-PRINCIPALS	COUNSELOR CONTACTS
Lane Middle School 7200 SE 60 th Ave Portland, OR 97206	916-6355 916-2648 (fax)	Mr.Karl Logan klogan@pps.k12.or.us	Ms. Terri Sing	Lynn Talent Danelle Johnson
Hosford Middle School 2303 SE 28 th Pl Portland, OR 97214	916-5640 916-2637 (fax)	Kevin Bacon		Sahjo Brown
Ockley Green 6031 N. Montana Portland, OR 97217	916-5660 916-2661 (fax)	Gregory Jones	Carol Egan Mary Schertz	Ann Schnider

Partnership Model

A Process for Strengthening Family, School, and Community Relations

Focus: Assessment

Key Actions:

Envisioning Possibility
Inviting Partnership
Identifying Strengths & Concerns

Developmental Task:

Trust-Building

Critical Questions:

What is it that I need from you?
What do I have to offer?
What are our mutual goals?
What is possible between us?
What are our mutual concerns?
What are my roles & responsibilities?
Who defines those roles?

Focus: Evaluation & Replication

Key Actions:

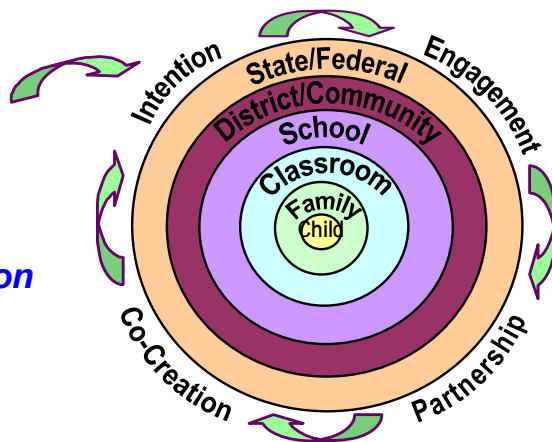
Evaluation
Celebration/Recognition
Strengthening Base of Support
Re-commitment

Developmental Tasks:

Celebration & Acceptance

Critical Questions:

In what ways have we been successful?
How shall we plan to publicly recognize our success?
What has not worked?
How do we replicate and share our successes?



Focus: Problem Solving

Key Actions:

Communication / Dialogue
Compassionate listening
Training/ Skill Building
Renegotiating Roles

Developmental Tasks:

Recognizing & Managing Differences
Conflict Resolution

Critical Questions:

What have we done to create a safe environment for candid dialogue?
What is our plan for managing conflict?
How do we use feedback to strengthen or modify our roles?
What skills do we need to build to overcome barriers and attain our mutual goals?

Focus: Collaboration

Key Actions:

Planning & Implementation
Doing, Doing, & Re-doing

Developmental Tasks:

Mutual Understanding

Critical Questions:

What do we want to make happen and how do we make it happen?
When & Where will we do it?
Who will do what and by when?
What resources are available to us?
What tool will we use to evaluate our work?

Upward Bound Objectives

TABLE 44: EVALUATION PLAN BY OBJECTIVE

Objective 1. State Benchmarks:		
50% of all UB participants, who at the time of entrance into the project had an expected high school graduation date during the school year, will have achieved at the proficient level during high school on state assessments in reading/language arts and math.		
METHOD OF EVALUATION	<i>TIMELINE</i>	DOCUMENTATION
Assess student academic need	Upon entry into project	In-take assessment tests and tools
Create and monitor student skill development Evaluate effectiveness of instruction & tutoring upon skill development and GPA improvement	Weekly, Monthly Quarterly	Student learning plan, written evaluation of student progress, examples of student work, tutoring and workshop attendance records
Determine progress with state benchmarks Review school grades and progress reports	Annually Quarterly	Student academic record from district
Review by Region X Evaluators	During grant cycle	Review Report
Objective 2. Project Retention		
80% of 9 th , 10 th , and 11 th grade project participants served during each school year will continue to participate in the Upward Bound Project during the next school year.		
METHOD OF EVALUATION	<i>TIMELINE</i>	DOCUMENTATION
Determine the number of students continuing in high school and the number of project dropouts.	September, February, June	Academic records Student rosters from Database Exit forms
Review advising and instructional contact records in staff meetings and individually with staff.	Weekly, Monthly	Database reports
Review by Region X Evaluators	During grant cycle	Review Report

Objective 3. Postsecondary Enrollment---GPRA Performance Indicator #1:		
75% of all UB participants, who at the time of entrance into the project had an expected graduation date during the school year, will enroll in a program of postsecondary education by the fall term immediately following the expected graduation date from high school.		
METHOD OF EVALUATION	TIMELINE	DOCUMENTATION
Review student checklists for financial aid, college & scholarship applications	September – April	Copy of senior checklist, copies of admissions forms, FAFSA, scholarship applications, advising case notes, transcripts
Assess activities for student participation and effectiveness	Monthly	Workshop & activity evaluations
Use Student Tracker online through the National Student Clearinghouse to determine college enrollment status	October – November	Online printout of enrollment dates & attendance status
Phone or email survey of seniors not found in Student Tracker	October	Advising case notes
Review by Region X Evaluators	During grant cycle	Review Report
Objective 4. Postsecondary Persistence---GPRA Performance Indicator #2:		
75% of all UB participants who enrolled in a program of postsecondary education during the fall term immediately following high school graduation will be enrolled for the fall term of the second academic year		
METHOD OF EVALUATION	TIMELINE	DOCUMENTATION
Use Student Tracker online through the National Student Clearinghouse to determine student college enrollment status	October – November	Online printout of enrollment dates, attendance status (full, half, or less than half-time)
Phone or email survey of students not found in Student Tracker	October	Advising case notes
Review by Region X Evaluators	During grant cycle	Peer Review Report

Table 64: EVALUATION PLAN: ETS Objectives

EVALUATIVE CRITERIA	METHOD OF EVALUATION	DOCUMENTATION
OUTCOME OBJECTIVE I: 90% of non-senior secondary school participants served during each budget period will be promoted to the next grade level at the end of each academic school year.	Review activity reports to confirm student participation. Review transcripts to verify grade promotion.	Database/File: contact forms; activity attendance sheets; advisor notes of promotion; grade reports & transcripts
OUTCOME OBJECTIVE II: 85% of high school seniors (and their equivalents in alternative education programs) will graduate from secondary school or receive a certificate of high school equivalency during each budget period.	Review senior transcripts for status during Fall. Verify attendance at workshops & classes. Verify graduation with high school. Review student contact records to confirm student participation.	Database/File: senior transcripts; student contact forms; activity reports
OBJECTIVE III: 75% of “college ready” project participants will apply for financial aid during each budget period.	Determine number of college-ready participants. Collect evidence of application for FAFSA and other private aid. Use Student Tracking on National Student Clearinghouse website to confirm financial aid and enrollment in college.	Database/File: student transcripts, student contact forms; activity reports; copies of financial aid forms (FAFSA) or reports (SAR) and scholarship applications
OBJECTIVE IV: 75% of “college ready” project participants will apply for postsecondary school admission during each budget period.	Determine number of college-ready participants. Collect evidence of application for colleges. Use Student Tracking on National Student Clearinghouse website to confirm admissions to and enrollment in college.	File: student transcripts, attendance lists; contact forms; admissions applications, Student Tracking print-outs from the National Student Clearinghouse
OUTCOME OBJECTIVE V: 80% of “college ready” participants will enroll in a program of postsecondary education during each budget period (or during the next fall term).	Determine number enrolled via college applications, financial aid applications, acceptance letters, case notes, follow-up calls, direct confirmation from colleges. Use Student Tracking on National Student Clearinghouse website to confirm enrollment in college.	File: record of follow-up contact; copies of applications, financial aid, or acceptance letters; Student Tracking print-outs from the National Student Clearinghouse

6. Important TRIO Web Sites

US Dept. of Education Sites: Federal Resources from COE

http://www.coenet.us/ecm/AM/Template.cfm?Section=Federal_Resources

EDGAR (Rules & Guidelines)

<http://www.ed.gov/policy/fund/reg/edgarReg/edgar.html>

OMB Circular A-21

<http://www.whitehouse.gov/omb/circulars/a021/a021.html>

[Oregon Department of Education](#)

[TRIO CAS Standards](#)

Hierarchy of Governing Documents



Explanation of Heirarchy

Governing Documents Hierarchy

In the case of the TRIO programs the authorizing Legislation is the Higher Education Act of 1965, which has been amended as recently as 2002. That's when Grant Aid Legislation came into being for Student Support Services. Upward Bound was amended earlier to allow for work study stipends. All the TRIO programs are referred to as Title 4, Part A, Sub Title 2, Chapter 1, Section 402A. 402A is the umbrella for all TRIO legislation.

Section 402C is the UB component; that's what has been excerpted for you. Another piece of legislation that's critically important to these programs is the Civil Rights Act of 1964. These are statutes that apply to all TRIO programs.

Once Congress has passed the Legislation, the Executive Branch, which in this case is the Department of Education, writes the implementing Regulations. These are compiled in what is called the Code of Federal Regulations (CFR). All Department of Education Regulations are found in Title 34 of the Code of Federal Regulations.

These regulations include:

- *Part 74, 75 etc. (which you know as EDGAR)*
- *Part 645 (which are the UB regulations)*

Incorporated in EDGAR are:

- *OMB Circulars, by reference*
- *Expanded Authorities*

When CFR is referenced, it potentially includes all the above. You might also see or hear terms like "Program Regulations" or "TRIO Regulations" used interchangeably. The final thing to keep in mind with federal regulations is a document called the Federal Register. It's published every federal working day, and that's where Notices of Purposed Rule Making, closing dates for grant applications, etc. are published.

Let's look at EDGAR and the OMB (Office of Management and Budget) Circulars, which for the purposes of Upward Bound can be A21, A87, A102, A110 and A122.

OMB Circular A21 is also known and referred to as the Cost Principles. If you look in EDGAR on page 15, on the lower part of the page, part 74.27; it talks about allowable cost. These are general Cost Principles for all federal programs and this is where it gives you that OMB Circular reference, OMB Circular A21. So in that matrix where they say "for the cost of an educational institution", which most TRIO programs are, A21 is the applicable circular. OMB Circulars A110 and A102, which are the uniform administrative requirements, are the other circulars which are applicable. You'll see references throughout EDGAR to A110 and A102. Sometimes what you'll see in EDGAR is a re-statement of the OMB circular and if you want to understand a little bit more about the rationale, you can go to the circular and it will talk about it in a little more detail. Keep in mind that there is a section in the TRIO regulations which addresses specific allowable costs related to TRIO programs, so the OMB Circular is not necessarily the last word.

The Office of Management and Budget is the President's office that manages all the federal awarding agencies. Any form any federal agency sends out must have an OMB approval number. For example, when you send in a performance report, on the upper right hand side of the Performance Report Instructions, there is an OMB approval number. Any form the Department of Education sends out to ten or more recipients has to have an OMB approval number. OMB covers such things as the administrative requirements and that means all the other federal agencies are doing the same thing.

To recap, the hierarchy of governing documents is, the Statutes, or the Higher Education Act of 1965 as amended, and the other pieces of Legislation that's been mentioned take precedence over the Regulations in the case of the work study stipends. They trump everything. The next

thing is your TRIO regulations, Part 645. EDGAR comes next and the OMB Circular, which is part of EDGAR by reference. There are the General Administration Regulations, such as GEPA, which is the General Education Provisions Act. In EDGAR there are a lot of GEPA references, because it's the basic foundation for the EDGAR documentation. Another document you will hear about is GEPA, or the Government Performance and Results Act. That's the one that says that you are making a difference with these programs. The final governing document is your own approved grant proposal.

[TRIO Higher Education Act of 1965](#)

Program Officer

Sheila Rieser

202-502-7889

Sheila.Rieser@ed.gov

Council for Opportunity in Education (National Organization)

<http://www.coenet.us//ecm/AM/Template.cfm?Section=Home>

TRIO Research and other Documents: <http://www.pellinstitute.org/>

Portland Public Schools: www.pps.k12.or.us

NASP (Northwest Association of Special Programs): <http://www.nasp-trio.org/>

National Student Clearinghouse: Enrollment Search: <http://www.studentclearinghouse.org/>

Portland State University Links

[Human Resources](#)

[Office of Information Technologies](#)

[Educational Equity Programs and Services](#)

[ESS Tech Support](#)

[AAUP Bargaining Agreement \(Full Time Faculty\)](#)

[SEIU Local 503, OPEU \(Classified Employees\)](#)

[Affirmative Action](#)

[Sexual Harassment](#)

[Policies, Contracts and Employee Relations](#)

7. Employee Policies & Procedures

A. Daily Sign-In Sheet at target schools

B. Attendance at ETS meetings, UB Meetings & Joint ETS/UB Meetings

C. Staff Monthly Self-Evaluation Checklist

Topic	Completed? Yes/No
1. Attended joint UB/ETS staff meetings.	y/n
2. Attended monthly 1-on-1 meeting with director.	y/n
3. Attended all ETS meetings or all UB meetings.	y/n
4. Accurately documented time & effort in Meeting Maker, including a database match for student appointments	y/n
5. Quality Assessment (during 1-on-1) A. Community/School Partnership Progress B. Aide Supervision C. Student/Parent Participation in Activities (including UB students on contract) D. Documentation of Service in Files E. Progress on Individual or Team Projects	Narrative

ETS Monthly, Quarterly & Biannual Report Formats

Monthly Reports: sent by Office Manager to Coordinators

- 1) Total Student Rosters
- 2) Students seen >1 time
- 3) Students seen <2 times

Quarterly Reports: sent by Coordinators to Director

- 1) Quarterly review (Sept. – Dec.) by school of
 - a. What worked
 - b. What did not work

You could include such items as: relationships, space, trips, or curriculum

- 2) Quarterly projection of curriculum (by school if they are each different)
- 3) Quarterly evaluation of staff/students assisting you in your schools
- 4) Timeline:
 - a. September – December: January 15
 - b. January – March: April 15
 - c. April – June: June 15

D. Weekly Schedule in Meeting Maker

All weekly schedules must be kept up-to-date in Meeting Maker, and read/write access must be given to both the UBETS Office Specialist, as well as the Director. The Office Specialist will need to add meetings to employee schedules, so all employees on a daily basis must review the calendar tool in Meeting Maker. (Include partnership, teacher, parent, & other school or community meetings in your calendar.) Professional staff are on flex time. Hours are recorded on a daily basis. Staff who work more than 8 hours on a given day need to adjust their schedules on subsequent days. These work schedule adjustments must be made during the same month as the extra hours. No extra hours worked can be carried over to the following month. Those hours are lost and cannot be accumulated. In addition, no employee should work more than 184 hours per month. Days marked “Out” should include a specific justification (date, hours) for time accrued previously.

When reporting sick leave at the beginning of the day, call or email Catherine. When going home sick in the middle of the day, call Phillip’s cell phone: 503-201-1529

E. Events

1. Weekly/Monthly Activity & Workshop Sign-In Sheets

All UB/ETS sign-in sheets should be turned into the sign-in sheet box in the Main Office. Sign-In sheets should indicate program, activity type, date, and school. (Each student’s name legibly printed.) If a sign-in sheet is not available, provide the mentioned information clearly on a sheet of paper.

2. Field Trips (any activity requiring transportation, food, or lodging approval) require the following documentation:

- a. *Budget Form* – to be reviewed two weeks prior to trip arrangements for approval
- b. *Permission Slips* – to be signed and used by Advisor during the trip – make sure that event title, date, and names are legible and clear. Shred permission forms after use.
- c. *Trip Evaluation Forms* – to be filled out on return of trip. Again make sure that event and date are legible.
- d. *Sign-In Sheet*

3. Process: Each Advisor will first complete a Pre-Activity Budget Approval Form. After director approval, the Office Manager will create an activity folder for the advisor and return the Budget Approval form in the packet with evaluation forms and a sign-in sheet. Please collect all completed evaluations and include your trip receipts at time of submission to OM.

4. Field Trip Protocol

a. Notification of Field Trips

Throughout the year, Upward Bound and ETS will notify students through a variety of media, including: flyers, e-mail, e-newsletters, web-site calendar, phone calls, and monthly class meetings. Often, the High School Coordinators will select students who meet specific guidelines appropriate for a given field trip.

b. Signing up for Field Trips

For the most part, students are welcome to sign-up for events in the UB/ETS Tutoring Center where we post sign-up sheets or through their appropriate advisor. These sign-in sheets are also made available during the monthly class meetings, and the advisors will often reserve spots for students whom they deem well-suited for a particular event.

c. Student Eligibility for Field Trips

- i. Eligibility for trips is most often dictated by the university, business, or other entity that will be hosting the event. Some college visitations are only open up to seniors, while some are tailored for younger students. The flyers and other media we create advertising an event will list eligibility criteria.
- ii. If a student continually signs-up for an event and does not attend that event, nor does the student inform our office of his absence, then we reserve the right not to allow the student to attend trips out of town or to attend overnight visitations.
- iii. Students must also be in “good standing” by either having a minimum 2.00 cumulative GPA, or by demonstrating consistent attendance in the tutoring centers in efforts to raise their GPA.

d. No-show Policy

If a student cannot attend an event that they signed up for, we ask for a 24 hour notice, so that we may make that spot available to another person.

e. Field Trip Organization

When participating on a field trip, staff are responsible for determining bedtime schedules, wake-up times, visiting privileges, and any other activities that will add to group camaraderie. Students will be expected to fully participate in all planned activities and abide by the staff rules established for the trip.

5. Permission Slips (Sample Attached)

6. Transportation Policies

- a. City Bus---Students will not be allowed to use city buses after 10:00 pm unless authorized by parent; Two tickets handed out each trip: one to get home, the other to return to UB/ETS.
- b. State motor pool van, Enterprise van, Laidlaw Bus, or Raz:
Students will be dropped off at our main office, 633 SW Montgomery.

7. Calling Parents

Parents may be called under these circumstances:

- i. Classroom Behavior
 1. Rude behavior will be dealt with by the instructor in the classroom
 2. Expulsion from classroom will result in a phone call and referral form.
 3. Computer violations or misuse.
- ii. Attendance
 1. Failure to show up at any specified appointment
 - a. Advising Appt.
 - b. Field Trip
 - c. Workshop or Class
 - d. Tutoring appt.
- iii. Academic Performance
 1. Initial contract meeting for students on contract

2. GPA or specific grade/course concerns the advisor has
3. Tutoring Quality Issues (Time-on-task issue)
- iv. Health Reasons
 1. Required hospital care
 2. Not eating on an extended field trip or at UB summer camp
 3. Sprained ankles, or other injuries
 4. 1st or 2nd degree burns
 5. Bee stings, insect bites, ticks
 6. Snake bite
 7. Giving OTC medication
- v. Student Behavior on Field Trips
 1. Fighting
 2. Swearing or rude interpersonal behavior to other students or staff
 3. Sexual or inappropriate touching behavior of other students or staff
 4. Disobeying any rules or guidelines established for any trip
 5. Alcohol or drug use

8. Incident Reports

Any behavioral incident where a student is reprimanded, sent home, or timed out in any major way requires a behavioral referral form to be written and given to the Advisor & Director. A parent meeting may be scheduled as follow-up.

9. Student/Staff Interaction

Staff should always be conscious of the environment surrounding student interaction. Staff should maintain appropriate boundaries with students. Staff are expected to follow the public school guidelines regarding student communication and interaction.

H. Procurement Cards

The VISA Procurement Card makes it possible for staff to purchase non-food supplies. There are very strict policies on using these cards and if the policies are not followed, our Research Accounting office can retract our Procurement Card Privileges, making expenditures a lot more difficult.

The acting Procurement Card Custodian (Office Manager) is responsible for validating card use. **The card needs to be checked out with her and returned to her.** The card is not to be passed from advisor to advisor because receipts and documentation need to be turned in. On the receipt the Advisor must write to following information: **Name of Event and Number of students attending event. Sign-in sheets need to be included with receipts.** DOE also requires the **itemized receipt** showing items and meals purchased. Staple all receipts and turn in with the card. The Advisor is also responsible for filling out the log showing the event, date, and advisor responsible for use. The Advisor must put the correct information in the correct log book. Any ordering online should be done by the Office Manager only, and she must either print the online order form or the email confirmation of the order and turn it in when she logs in the purchase.

Advisors are never to use the card for anything that is not related to Student Services. Failure to follow these procedures might result in retraction of card privileges.

Suggested Uses

- Office supplies
- Operating supplies for department or project

Computer hardware and soft ware (non-capitalized <\$5000)
 Teaching research materials and supplies
 Materials for minor repairs (not the repair itself)
 Non-Capitalized furniture
 Conference registrations
 Subscriptions to magazines, journals, newspapers
 Allowable dues and Memberships

Exclusions

Travel purchases (airline tickets, gasoline, lodging or meals – traveler uses Corporate Card)
 Hosting official guests (host uses Corporate Card then files a personal reimbursement)
 Repairs of vehicles or equipment
 Capitalized equipment (>\$5000) or upgrades
 Cash advances or returns
 Rental of Equipment, furniture, facilities, etc.
 Personal/professional services (PSC's) with independent contractors/consultants
 Printing/Copying (Clean Copy, and Kinko's will bill indexes)
 Awards and prizes
 Alcoholic Beverages
 Gifts or Flowers
 1099 reportable service (see Expenditure Account Code list from BAO)
 Personal purposes benefiting you or other persons individually rather than facilitate the
 Discharge of the official functions or duties of your department or yourself

I. Travel Cards

The VISA Travel Card makes it possible for Advisor Staff to host Student Events (meals & event tickets, or entry), pay for hotels, and go on off-campus trips. There are very strict policies on using these cards and if the policies are not followed, our Research Accounting office can retract our Procurement Card Privileges, making expenditures a lot more difficult.

The acting Procurement Card Custodian (Office Manager) is responsible for validating card use. **The card needs to be checked out with her and returned to her.** The card is not to be passed from advisor to advisor because receipts and documentation need to be turned in. On the receipt, the Advisor must write to following information: **Name of Event and Number of students attending event. Sign-in sheets need to be included with receipts.** DOE would also like the **itemized receipt** showing items and meals purchased. Staple all receipts and turn in with the card. The Advisor is also responsible for filling out the log showing the event, date, and advisor responsible for use. If the advisor is ordering online, they must either print the online order form or the email confirmation. Then turn it in when they log in the purchase. Advisors are never to use the card for anything that is not related to Student Services. Failure to follow these procedures might result in retraction of card privileges.

J. US Bank Corporate Card

– All advisors should have a US Bank Card. This card has no interest rate and allows advisors freedom to remove cash from the ATM (*In the case that VISA is not accepted*), purchase competitive airfare on-line, and pay for food and lodging. With the necessary receipts and within the allotted amounts, a reimbursement will be filed and a payment will be sent to the Advisor in time to repay his card expenses. This card is the sole responsibility of the Advisor, so failure to comply with allotted costs will result in payment by the Advisor.

K. Reimbursements - MUST be turned in within 60 days of trip/event.

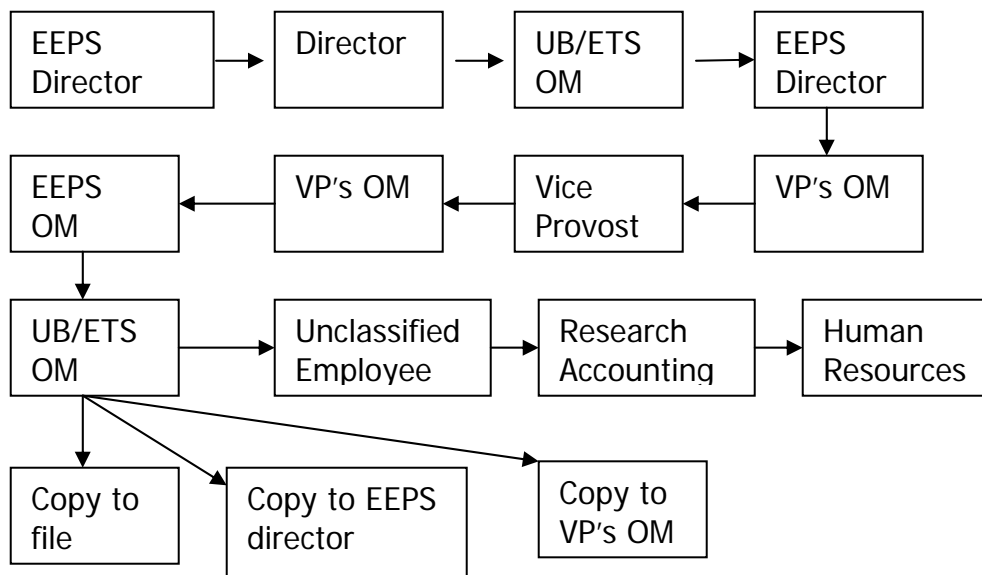
Mileage, Travel Receipts and Personal Reimbursements must be approved within the department, then they are routed to research accounting. Once PSU Accounting has approved expenditures, a check will be cut and mailed to you or directly deposited into your checking account. You will be notified via email that your check has been direct deposited. It generally takes 3 days from email notification for the money to show up in your bank account. If you would rather pick up your check once it is cut to avoid waiting please indicate that when turning in your receipts.

- a. **Mileage-** Advisors should use the mileage form and turn it in monthly to the UB/ETS Office Manager. Advisors are responsible for listing and totaling mileage up on the form or submitting their mileage to the UB/ETS Office Manager on a monthly basis. Any mileage form that is turned in without mile information will be returned. The rate is currently \$0.55 a mile.
- b. **Personal** – In the event that an Advisor must spend his/her personal funds for student needs, the advisor will need to submit a receipt with purpose and itemization to UB/ETS Office Manager.
- c. **Travel** - Travel reimbursements vary and depend on city and duration. All receipts must be kept in order to be reimbursed, such as taxi and lodging costs. In the case of per diems, receipts are not necessary, but traveler will not be reimbursed for costs above the allotted amount.

L. Letters of Appointment

Letters of Appointment are processed twice a year, September and June. Portland State University follows the State Fiscal Year (July – June) and Upward Bound and ETS/Project PLUS follows the Federal Fiscal Year (September – August). This crossover requires that we rehire our Faculty during the summer months, as all faculty contracts with PSU are terminated at the end of June.

The routing process for Letters of Appointment is as follows:



M. Annual Personnel Evaluation

---Every May, employees will complete a self-evaluation and discuss it with the Director, who will also rate employee performance according to individual job descriptions, the project mission

statement, the Enrollment & Student Services mission statement, and Portland State's mission statement. The monthly evaluation checklist will be used as information in performing the evaluation.

N. Year-End Reports

Senior Evaluation, Student Year-End Evaluation, 8th grade evaluations: These are crucial for producing the annual report to the Department of Education and will also be used in determining whether each employee met his/her annual objectives for student participation and performance as outlined in the employee job description. (See samples at back of handbook.)

O. Upward Bound/Project PLUS Transfer Process

a. Student Policy

Students who enter the Upward Bound program are admitted for a 60 day probationary period where we assess their participation in the program and their eagerness to attend UB sponsored events.

Upward Bound students have a minimum 70 point participation requirement, including 20 hours that can come from school involvement. If students do not meet this requirement during a 1 semester period, they will be placed on a participation contract. If the conditions of the participation contract are not fulfilled, then we will transfer the student to Project PLUS so that they may still receive virtually the same services that were available to them while in Upward Bound (see attached transfer letter).

If a student's Cumulative GPA falls below a 2.0, then that student's Academic Advisor will construct an **academic contract**. If the student does not fulfill the obligations of the academic contract during a 1 semester period, they will be transferred to Project PLUS.

Note: This transfer process may not necessarily apply if it can be determined that the student is going through hardship, sickness, or some other obstacle to their academic success and participation with Upward Bound. **We always examine each student's academic profile and level of participation on an individual basis.**

b. File Transfer/Student Exit Policy.

When a student is being transferred from one program to another, all paper information will be given to the Office Specialist. The contents of the file will be placed in the new program file.

P. Appropriate Dress:

Professionalism often demands that we dress appropriately for the given context. Sometimes we may need to dress more formally to gain the proper respect from school administrators, secretaries, teachers, and counselors. Certain school functions may require a tie or suit for men or more formal clothing for women. Appropriate dress helps to mitigate other people's prejudices concerning race or ethnicity, gender, sexual orientation, hair length, or body decorations. As TRIO professionals, we need to gain the respect of our public school colleagues in order to work effectively in the target school. Mid-riff shirts or muscle shirts exposing skin are not appropriate work clothing for either gender during the academic year or summer, excluding camp or certain recreational field trips.

Q. Small Grants & Fundraising Policies

The Director must approve all small grants for monies or merchandise over \$500 before they are written. The Director's signature must accompany the principal writer's signature on the cover

letter of the grant after the final copy has been approved or revised by the Director. Donated items under \$500 do not need prior approval, but receipt of goods must be itemized and documented in writing and submitted to the Director so that the organization can receive an appropriate “Thank You” letter in addition to being recognized in our newsletter, in campus publications, and on our web page.

R. Computer Usage Policies

- A. Laptops---can be checked out for periods of time from the Director
- B. Software---All copies of software are to be kept on campus, but employees may check out software for home installation. Employees are encouraged to learn new software at their leisure, in both home and work settings.
- C. Email---Employees are held to acceptable use policies of the university regarding email messages. Employees all sign an AUP when receiving account ID’s and passwords.
- D. Chat Rooms are not appropriate for employee use during work time.
- E. Pornography should not be viewed by any employee in the UB/ETS offices.
- F. Computers, e-mail and fax are not to be used for political purposes.
- G. [Office of Information Technologies](#) [ESS Tech Support](#)

S. Application Procedures:

1. ETS Applications

a. The Advisor will first check applications coming into the program for legibility and missing information and then make any necessary adjustments. If application is received in the mail, the application will be routed to the Advisor.

**Applications with missing, or illegible information will be returned to appropriate advisor.*

b. After ensuring that the application has been totally completed, the Advisor will turn the application into the Application box in the ETS Office.

c. Receipt of Application will be annotated on application.

d. The Application will be assessed for eligibility and approved for acceptance by program director.

e. A form letter will be sent announcing acceptance and assigning appropriate advisor.

A hard file will be created for the student and an electronic file in Blumen.

g. A reinstatement email will be sent to the office manager to re-enter students into the projects.

2. Upward Bound: Procedures for Processing an Application

I. Recruiting advisor reviews and screens application(s) for completion

- a. Application---student must be low income or first generation
- b. Writing Sample
- c. School Counselor Recommendation with 8th or 10th grade benchmarks
- d. Transcript
- e. Copies of Tax Forms
- f. Copy of Permanent Resident ID
- g. Activity & Medical Release Form

II. When application is complete, have Director approve or reject application.

III. Create waiting list and mail rejection letter if necessary.

IV. Schedule interview

V. Assemble interviewing & orientation forms

- a. UB Student-Parent Commitment form
- b. Technology Skills Inventory
- c. Interview Questions

- d. Learning & Motivation Style inventory
- e. Student Handbook
- VI.** Interview student and parent(s)
- VII.** Decision written on application evaluation form
- VIII.** Make folder for file and Tutoring Room
- IX.** Acceptance letter sent out to student & parent

CONTENTS OF A COMPLETE UB APPLICATION

- ✓ COMPLETED APPLICATION, SIGNED BY PARENTS
- ✓ COPY OF ANNUAL TAX FORM FOR THE CURRENT YEAR
- ✓ LETTER OF RECOMMENDATION FROM SCHOOL COUNSELOR OR RECOMMENDING TEACHER
- ✓ COPY OF MOST RECENT TRANSCRIPT WITH 8th or 10th GRADE BENCHMARKS
- ✓ WRITING SAMPLE
- ✓ ACTIVITY AND MEDICAL RELEASE INSERT

ETS/Project PLUS

College/University Visit Evaluation

(Evaluación de Visita a un Colegio/una Universidad)

College: _____ Date: _____

1. This visitation was educationally useful to me *(Esta visita fue educacionalmente útil para mi)*.

1	2	3	4	5
no		somewhat <i>(un poco)</i>		yes

2. What information did you receive from the college visitation? *(¿Cuál información recibiste de la visita?)*

_____ Programs of Study	_____ Career Counseling	_____ Student Services
_____ Admissions	_____ Residence Living	_____ Other (please list):
_____ Expenses/Cost	_____ Financial Aid	_____

3. Would you like to apply to this college? *(¿Te gustaría solicitarte para esta universidad?)*

1	2	3	4	5
no		maybe <i>(tal vez)</i>		yes

4. I would recommend that other students participate in a field trip to this location in the future. *(Yo recomendaría que otros alumnos participen en otra excursión a este lugar.)*

1	2	3	4	5
no		somewhat <i>(un poco)</i>		yes

5. What other college or university campuses would you like to visit? *(¿Cuáles otras universidades te gustaría visitar?)*

6. Please make any additional comments you have about this activity: *(Favor de poner comentarios adicionales que tengas sobre esta actividad.)*

ETS/Project PLUS
Workshop Evaluation (*Evaluación de Taller*)

Activity: _____ **Date:** _____

1. This workshop was useful to me (*Este taller fue útil para mi*).

1	2	3	4	5
no		somewhat (<i>un poco</i>)		yes

2. The skills or information that I learned during this workshop will help me to enroll in college (*La información y habilidades que aprendí de este taller me ayudarán inscribirme en la universidad*).

1	2	3	4	5
no		somewhat (<i>un poco</i>)		yes

3. This workshop has motivated me to apply for college. (*Este taller me animó a solicitarme a una universidad*).

1	2	3	4	5
no		somewhat (<i>un poco</i>)		yes

4. I would recommend that other students participate in a similar activity in the future. (*Yo recomendaría que otros estudiantes participen en una actividad similar en el futuro*).

5. Please make any additional comments you have about this activity: (*Favor de poner comentarios adicionales que tengas sobre esta actividad:*)

ETS/Project PLUS
Field Trip Evaluation (*Evaluación de Excursión*)

Activity: _____ **Date:** _____

1. This field trip was educationally useful to me (*Esta excursión fue educacionalmente útil para mi*).

1 2 3 4 5
no somewhat (*un poco*) yes

2. The skills or information that I learned on this field trip will help me to enroll in college (*La información y habilidades que aprendí de esta excursión me ayudarán inscribirme en la universidad*).

1 2 3 4 5
no somewhat (*un poco*) yes

3. This field trip has motivated me to apply for college. (*Esta excursión me animó a solicitarme a una universidad*).

1 2 3 4 5
no somewhat (*un poco*) yes

4. I would recommend that other students visit this location in the future. (*Yo recomendaría que otros estudiantes visiten este lugar en el futuro*).

5. Please make any additional comments you have about this activity: (*Favor de poner comentarios adicionales que tengas sobre esta actividad:*)

Educational Talent Search: Project PLUS

Year-End Middle School 8th Grader Information Sheet

Student Name: _____

Date: _____

School: _____

_____ Will be advancing to the 9th grade.

_____ Will be attending the following high school: _____

Comments:

FOR OFFICE USE ONLY:

_____ Student has dropped out of school.

_____ Student has dropped out of Project PLUS.

_____ Unable to track student.

Entered in computer _____

Date _____



***Educational Talent Search/Project PLUS
Year-End High School Participant Evaluation***

GRADE YOU ARE COMPLETING THIS YEAR (circle grade level): 9 10 11 12

Instructions: Using a scale of 1 to 5 (1 being the lowest rating; 5 being the highest rating), please rate the following by circling the appropriate number.

1. Project PLUS helped me with academic planning such as providing academic advising, reviewing transcript, discussing academic plan, reviewing courses that prepare me for college and/or tracking graduation requirements and college admission requirements.

Rating: 1 2 3 4 5

2. Project PLUS helped me plan for college by encouraging and informing me of options available to pursue education beyond high school and providing exposure to college campuses.

Rating: 1 2 3 4 5

3. Project PLUS helped me with the college process; to understand the requirements needed for education beyond high school and/or completing the required forms needed for education beyond high school (standardized tests, college admissions, financial aid, scholarships, etc).

Rating: 1 2 3 4 5

4. Project PLUS helped me understand how to fund my education providing information and/or assistance with financial aid (FAFSA) and scholarships.

Rating: 1 2 3 4 5

5. Project PLUS helped me plan for my career and ultimately my college major by exploring my interests, courses of study, and exposing me to various careers through career field trips.

Rating: 1 2 3 4 5

6. Project PLUS helped me to understand the importance of civic responsibility and the need for community service for scholarship eligibility.

Rating: 1 2 3 4 5

7. I found the Project PLUS Advisor to be responsible, helpful, knowledgeable and well organized.

Rating: 1 2 3 4 5

8. I found the Project PLUS Advisor helpful in pursuing education beyond high school.

Rating: 1 2 3 4 5

These last two questions are especially important. Please provide feedback to help improve the program!

9. Project PLUS could be improved by:

10. Additional comments:

Educational Talent Search: Project PLUS

Year-End Middle School Participant Evaluation

Instructions: Using a scale of 1 to 5 (1 is the lowest rating; 5 is the highest rating), please rate the following by circling the appropriate number. Your answers will be used to improve Project PLUS, so please answer honestly and seriously.

1. I understand the purpose and goals of Project PLUS.

Rating: 1 2 3 4 5
 Comments:

2. Project PLUS helped me begin thinking about my educational and career goals.

Rating: 1 2 3 4 5
 Comments:

3. Project PLUS encouraged me to go to college.

Rating: 1 2 3 4 5
 Comments:

4. I found the Project PLUS staff to be responsible, helpful, knowledgeable and well organized.

Rating: 1 2 3 4 5
 Comments:

5. The Project PLUS staff took an active interest in my educational and life goals.

Rating: 1 2 3 4 5
 Comments:

What was your favorite class activity this year and why?

What was your favorite field trip and why?

In the space below, please tell us what we can do to improve Project PLUS:

Educational Talent Search/Project PLUS
Year-End Senior Information Sheet

Student's Name _____ Today's Date: _____
(First and Last) *(mm/dd/yy)*

Instructions: Please complete this entire form. Check ALL that apply regarding your upcoming plans:

I have completed and submitted a Free Application for Federal Student Aid (FAFSA) for the upcoming school year. _____ Yes _____ No

_____ I will be graduating from high school this June.

_____ I will be attending college next Fall.
(Please list intended college and mark whether you have applied or have been admitted.)

Two-year community college or junior college
_____ Applied Admitted

Public four-year college or university
_____ Applied Admitted

Private four-year college or university
_____ Applied Admitted

_____ I will be attending a vocational or technical institution next Fall.
_____ Applied Admitted

_____ I will NOT be attending any college, university, or other institution next Fall.
(Please list future plans.)

_____ I will be entering the Armed Forces. Date of entry: _____
Branch of Armed Forces: _____

Please list any scholarships, internships or special programs for which you have applied for.
(Please list the programs into which you have been accepted with an AC, i.e. Diversity Schol. - AC)

Student's Signature: _____

FOR OFFICE USE ONLY:

_____ Student has dropped out of high school.

_____ Unable to track student.

Entered in computer _____ Date _____

UPWARD BOUND/ ETS:PROJECT PLUS
NOTIFICATION OF ABSENCE FROM CAMPUS
 Please use this form for any planned absence from campus.
 Submit to Director at least 1 week in advance of absence.

Name _____ Dept _____

Will miss work on the following day(s): _____ 1 day only

OR _____ through _____

___ On University business _____
(name of conference / meeting / seminar)

___ Vacation

___ Leave Without Pay

___ Adjusted Work Schedule

Total Number of Working Days Requested _____

In my absence, _____ will be responsible for my departmental duties.

Date

Employee Signature

Date

Supervisor Signature

Upward Bound & ETS/Project PLUS Student Address Change Form

Program: UB _____ ETS _____

Student's Name _____

Current School _____ School ID Number _____

Cell Phone _(_____) _____ Text Plan? Yes No

E-mail 1 _____

E-mail 2 _____

Current Residence:

Mailing Address _____

City _____ State _____ Zip _____

Home Phone _(_____) _____

Emergency Contact:

Name _____

Relationship (*aunt, uncle, etc.*) _____

Emergency Phone _(_____) _____

UB and ETS/Project PLUS Student Exit Form

Date _____

Student Name _____

Current School _____ Current Grade _____

Program: UB _____ ETS _____

Action: Exit _____ Transfer _____

Please **circle** the reason for discontinuation of this student's services:

Graduation Non-participation Moved Dropped Out Unknown

Comments _____

Educational Advisor _____

Sample of Transfer Letter

Date

Parent Name

Address

Dear _____:

Since integrating Upward Bound and Project PLUS, we have been working on ways to smoothly connect them and serve students as effectively as possible. According to our funding agency, the U.S. Department of Education, what distinguishes Upward Bound from Project PLUS is **individual instruction**. Approximately \$5000 is spent on each student in the Upward Bound program every year, as opposed to \$500 per year for Project PLUS students. UB students are required to attend tutoring, two workshops a month, and an intensive academic summer program. UB students are also given the opportunity to attend more cultural and recreational activities than Project PLUS students. Because so much more intensive effort is given to these students, we need to have full participation and commitment from every student.

Since _____ has shown little interest in participating, she is being transferred from Upward Bound to Project PLUS. This does not mean that _____ cannot benefit from many of the same services. Both programs share academic workshops and college visitations. Both programs also teach technology skills and lead students through the college admissions process of researching college majors, careers, and scholarships. Although tutoring is NOT required of Project PLUS students, we do invite them to our facilities to receive tutoring as well as use our computers. Because Project PLUS more adequately matches the degree of participation that _____ is demonstrating to us, we will transfer her file and place her on the ETS/Project PLUS mailing list. Please have _____ contact Jason Young, Educational Talent Search/Project PLUS High School Academic Advisor.

If you have questions or concerns, please feel free to call us at 725-4458. Thank you for your continued support.

Sincerely,

Phillip Dirks

Director

Upward Bound / Project PLUS.

Educational Talent Search/Project PLUS Portland State University P.O. Box 751, Portland, OR 97207-0751 (503) 725-4458	PERMISSION FORM OFF-CAMPUS PROJECT PLUS SPONSORED ACTIVITY FOR PORTLAND HIGH SCHOOL STUDENTS
--	---

Activity:

Date:

Departure Time

Return Time:

Meeting Location:

Supervisor: Telephone number:

PARENT/GUARDIAN:

Dear Parent,

Please complete this form granting permission to Educational Talent Search/Project PLUS, to take your child (*Name of student*) _____ on the above described trip, and if necessary, receive emergency medical care. I have discussed with my son/daughter that he/she must abide by all Project PLUS rules and regulations and those of the site you will be visiting.

Please select one of the following transportation options: I will be picking up my child at the designated location listed above. My child has permission to walk home. Please provide my child with a tri-met bus ticket to return home.

I, the parent/guardian of the above named student, grant permission to Educational Talent Search/Project PLUS staff and its Director to authorize necessary medical services in an emergency, including injections, anesthesia, surgery, medication and hospitalization. I understand that every effort will be made to contact a parent or guardian. If I cannot be contacted at the telephone number(s) shown below, I agree to be responsible for any expenses that may be incurred in providing medical services as a result of an accident or medical emergency.

Parent/Guardian Signature

Date

Telephone Number

Work Number

Name of Health Insurance Provider

Policy Number

Emergency contact person & Relationship to Student

Telephone Number

List any special health needs, allergies or current medications we should be aware of

STATE OF OREGON

CONDITIONS OF VOLUNTEER SERVICE

As a volunteer working in a State of Oregon agency, you need to understand the extent to which you are covered by State of Oregon insurance for liability and personal injury/illness. Please read the following carefully and sign below.

Tort Liability

You will be protected from civil liability for injuries or damage to the person or property of others, subject to the following general conditions:

1. You are working on a state agency task assigned by an authorized agency supervisor;
2. You limit your actions to the duties assigned; and
3. You perform your assigned tasks in good faith, and do not act in a manner that is reckless or with the intent to unlawfully inflict harm to others.

The conditions and limits of this protection are as stated in the Oregon Tort Claims Act, ORS 30.260-300, and Oregon Department of Administrative Services Risk Management Division Policy Manual, 125-7-202.

Motor Vehicle Liability

If you use a personally owned vehicle in the course of your duties you are required to have automobile liability insurance to provide your primary coverage for any accidents involving that vehicle. State provided auto liability coverage will apply on a limited basis only after your primary coverage limits have been used.

Volunteer Injury Coverage

Workers' compensation is not provided. However, the agency has an injury protection plan to cover injuries of authorized volunteers. It is limited to only injuries due to an accident while performing volunteer duties. The state will pay medical treatment bills, disability, death and dismemberment benefits to the limits and under the terms and conditions described in Oregon Department of Administrative Services Risk Management Division Policy Manual, 125-7-204. If you are injured in a private vehicle, the owner's insurance is responsible for your medical bills.

Reporting Responsibility

Any time you are involved in any accident or exposed to a potential liability situation while performing assigned duties, you must inform _____ (name or title) as soon as possible.

Assigned Duties (Note if any document is attached or referred to for details) _____

I HAVE READ AND UNDERSTAND THE ABOVE DUTIES AND CONDITIONS OF VOLUNTEER SERVICE

Please Print

Name (Last, First, M.I.)	Social Security Number
Address	Telephone
Signature	Date
In case of emergency, please notify	
Home Phone	Work Phone

Agency Supervisor	Telephone
Title	Date

Form for Liability and Volunteer Injury Coverages

READ AND SIGN THE WAIVER AND RELEASE ON THE NEXT PAGE
AUTHORIZED STATE VOLUNTEERS
PARTIAL WAIVER AND RELEASE OF RIGHTS
UNDER THE OREGON TORT CLAIMS ACT
ORS 30.260-300

READ CAREFULLY
(Please Print Information)

Name: _____

Phone: _____

Address: _____

City/State: _____

Zip Code: _____

As an authorized state volunteer performing activities on behalf of the State of Oregon _____ (agency), I understand that the State of Oregon will provide limited medical and accidental death, dismemberment and disability coverage for me in the event I suffer injury due to an accident while performing volunteer duties. In exchange for the coverage, I, for myself, my heirs, executors, administrators and assigns, release and forever discharge the State of Oregon from any and all demands or claims for damage or injury, from any cause of suit or action, known or unknown, that I may have against the State of Oregon, and/or its officers, agents or employees, and from all liability under the Oregon Tort Claims Act, ORS 30.260-300, for any and all harm or damage to my health in any manner resulting from or arising out of my state volunteer activities.

This release does not extend to or waive any rights I may have under the Oregon Tort Claims Act, ORS 30.260-300, to defense and indemnification from any demand, claim, suit or action brought against me, or liability I may be subject to, or arising out of my authorized state volunteer activities.

In the event that I am injured while performing state volunteer activities, I will notify my agency supervisor and apply for injury coverage benefits.

Signature: _____ **Date:** _____

PARENT OR GUARDIAN’S AUTHORIZATION FOR MEDICAL CARE AND CONSENT TO AGREEMENT

Read Carefully

I, _____, as parent or legal guardian hereby grant permission for _____ to do volunteer work for the _____ (agency). In the event of an emergency, accident, or illness, I authorize the agency and its employees to administer emergency medical care to my child and/or, if deemed necessary, to secure emergency medical services and incur expenses for which I will be responsible for payment. **My signature below hereby represents that I have read, understand, and consent to this agreement.**

Signature: _____ **Date:** _____

(Legal Guardian signature required if volunteer is under age 18 years.)

Read the first page of this document

Statement of Confidentiality

In accordance with the Family Rights and Privacy Act, I understand that the following documents collected by Educational Talent Search and Upward Bound require the utmost confidentiality: transcripts, test scores, social security numbers, financial aid information and enrollment status. I will uphold the confidentiality of all documents and information I am in contact with in ETS/Project PLUS and Upward Bound.

Employee Signature

Date

**PROJECT PLUS PRE-ACTIVITY
BUDGETING FORM**

ADVISOR'S NAME: _____

ACTIVITY DESCRIPTION: _____

ACTIVITY TYPE:

FIELD TRIP: <input type="checkbox"/>	WORKSHOP: <input type="checkbox"/>
College Visitation <input type="checkbox"/>	Cultural <input type="checkbox"/>
Corporate Visitation <input type="checkbox"/>	Academic <input type="checkbox"/>
Cultural <input type="checkbox"/>	Career <input type="checkbox"/>

Number of Students Participating: _____

DATE	MEALS	TRANSPORTATION	HOUSING	EQUIPMENT AND MATERIALS	REGISTRATION FEES
	B: L: D:				
	B: L: D:				
	B: L: D:				
TOTALS:					

Director's Approval: _____

Field Trip Protocol

We need to have the following pieces planned out before I will approve a field trip:

1. Staffing---Identify by name

_____	_____	_____
_____	_____	_____

2. Arrival/Parking Plan---how will students be dropped off and where will the vans be parked?

3. Participation Agreement: All students must agree to participate fully in the activity and not wander around.

4. Central Meeting Zone: a central meeting place should be established either before-hand or when you step off the van.

5. Lost Student Plan: where should students meet if they get lost? Establish a final meeting place prior to boarding the van for return.

6. Return Protocol: Students may walk home from their school drop-off only during daylight hours. At night, we must ensure pick-up by the parents or drive the students home. Arrival back at the school should match the Permission Slip. Never leave students alone waiting for their parents.

7. All students must have completed applications to go on any field trips! Submit your student list to Cathy so she can check for field trip eligibility.

Procurement/Travel Card Request Form	
Date: _____	
Person requesting Procurement/Travel Card: _____	
Date(s) Card will be needed: _____	
Type of Card: ___ Procurement ___ Travel	
Department: ___ UB ___ ETS	
Reason Travel/Procurement card is needed: _____	

Cost: _____	
Directors Approval: _____	
Date: _____	