Request for Proposals (RFP)
FY2024

Guidelines and Procedures for
Summer Academies for
Science, Technology, Engineering, and
Mathematics (STEM)

Oklahoma State Regents for Higher Education
655 Research Parkway, Suite 200
Oklahoma City, OK 73104

CLOSING DATE: September 15, 2023, 5:00 p.m. CST

OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION

Important Dates

August 1, 2023	RFP distribution
Third Friday in August 2023, 2024, 2025	Technical assistance videoconference meeting 2:00 pm via videoconference
	Register in advance for the August 18, 2023 meeting: Summer Academies Technical Assistance Meeting Registration After registering, you will receive a confirmation email containing information about joining the meeting.
September 15, 2023	Proposal submission due
December Regents Meeting	Notification of awards at State Regents' Meeting; Award letters to follow
January TBA 2024, 2025, 2026	Orientation meeting for directors of funded Summer Academies 2:00 pm via videoconference
February 1 2024, 2025, 2026	Final Overview edits due (including URLs & application information)
March 1 2024, 2025, 2026	Student application posting due
April 1 2024, 2025, 2026	Student selection may begin
April 30 2024, 2025, 2026	First 50% of payment sent out
June 30 2024, 2025, 2026	Second 50% of payment sent out
21 days following last academy date each year	Final Participant Report and Final Written Report due
September 1 2024, 2025, 2026	Final Report of Expenditures due

Summer Academies for
Science, Technology, Engineering and Mathematics (STEM)

I. History, Purpose, and Definitions

A. History and Purpose

Begun as an initiative by several members of the 1989 Oklahoma legislative session, the passing of Senate Bill 269, authored by Representatives Glen Johnson and Lloyd Benson and Senators Stratton Taylor and Kelly Haney, paved the way for the establishment of the Summer Academies for science, mathematics, and multidisciplinary studies. Governor Henry Bellmon signed the legislation into law, and the Oklahoma State Regents for Higher Education (State Regents) developed the criteria for the operation of the academies.

The Summer Academies promote instructional curriculum and techniques designed to stimulate interest in the Science, Technology, Engineering, and Mathematics (STEM) fields, and to encourage multidisciplinary, hands-on experiences for Oklahoma students that spark interest in furthering their higher education experiences.

B. Definitions

The original language of the bill included references to science, mathematics and multidisciplinary studies, in line with the commonly used terminology of the time. Current terminology commonly refers to these areas as Science, Technology, Engineering, and Math (STEM) fields, so for clarity and consistency in the RFP, STEM will be the terminology used throughout the remainder of the document.

For the purpose of this Request for Proposals, STEM fields are those subject areas that explore practical applications in science, technology, engineering, and math and relate them to the world in which we live.

II. Absolute Priorities

A. Absolute Priority One: Provide stimulating learning opportunities for student participants through focused and motivating activities in STEM.

   a) Successful Summer Academies will challenge students with relevant STEM-related content in a creative and engaging environment. Curriculum should include multiple ways of demonstrating the concepts presented. Methods such as hands-on activities, experimentation, exploration of new technologies, and outside speakers should be deployed in a supportive, collaborative manner that encourages learning on multiple levels.
   b) Summer Academy curricula should strive to align with, but not duplicate, core curriculum material the students will experience in subsequent school years.

B. Absolute Priority Two: Encourage participation and success in a post-secondary higher education experience as an expected and logical outcome for all student participants, with particular emphasis on outreach to underserved subgroups.

   a) Build student confidence, knowledge level, and comfort in an effort to prepare them for future STEM field instruction. Develop and promote career and educational aspirations by providing an opportunity for students to explore both personal and career goals and become

familiar with various areas of study in the STEM fields available at post-secondary institutions.

b) Help student participants develop early awareness about the need to plan personally, academically and financially for college. Information about college admissions, OK Promise, OKCollegestart.org, Pell Grants and other financial aid should be shared and actively integrated into discussions and activities.

c) Immerse student participants in an authentic college campus living or college commuter experience in as many ways as possible during academy attendance. Establish partnerships with a variety of Oklahoma businesses, including community and nonprofit organizations, who can tie academy knowledge and higher education attainment to future related work experiences and careers.

III. Program Administration and Information

A. Program Administration: Authority for the administration of the Summer Academies as well as the identification and evaluation of institutional applications resides with the Oklahoma State Regents for Higher Education. The State Regents have been authorized to receive and distribute funds for this program as grants to be utilized by Oklahoma higher education institutions to create Summer Academies for Oklahoma students. The Chancellor for Higher Education acts on behalf of the State Regents for the solicitation and selection of applications for the grant program.

B. Program Information: A virtual technical assistance meeting is scheduled for Friday, August 18, 2023, via Zoom from 2:00 p.m. to 3:00 p.m. and will include a brief presentation followed by a question and answer session related to proposal development.

To participate in the meeting, please register in advance at:
Summer Academies Technical Assistance Meeting Registration
After registering, you will receive a confirmation email containing information about joining the meeting.

To help guide the meeting, interested parties are encouraged to email questions prior to August 18, 2023. Questions should be emailed to summeracademies@osrhe.edu. To the extent possible, additional questions will be accepted from attendees during this virtual technical assistance meeting.

For awarded Summer Academies, a technical assistance meeting will be held on the third Friday of August for each year of the grant to review yearly requirements.

IV. Eligible Applications

A. Applications may be submitted by any public or private accredited Oklahoma degree-granting institution of higher education.
B. The proposals must target students who are Oklahoma residents and may not exclude students based on location within the state of Oklahoma.
C. Only three-year proposals will be accepted under the State Regents Summer Academy Grant Program.
D. Academies in excess of two weeks will not be funded under this State Regents Summer Academy Grant Program.

V. General Guidelines

A. Learning and Supervision

1. Programs are to feature curricula that are designed to introduce students to specific STEM topics while assisting them in developing communication and problem-solving skills.

2. Curricula should supplement, but not duplicate, middle or high school courses. The Summer Academies should serve as an opportunity for student exploration, experimentation and career motivation, specifically in STEM areas.

3. It is understood that some students in the target population may be deficient in some skills; however, most students learn best through engaging, hands-on, exploratory experiences rather than rote drill activities. The State Regents Summer Academy Grant program is NOT intended to fund remedial classes.

4. Faculty with appropriate academic expertise should be selected to ensure maximum program success. Faculty may come from colleges, universities, high schools or the private sector. Faculty selection is not limited to Oklahoma residents. The State Regents strongly recommend that at least one of the key personnel be a K-12 teacher or curriculum specialist.

    a) It is strongly recommended that K-12 teachers/curriculum specialists provide relevant direction on curriculum and pedagogy for the applicable grade levels.

    b) Instructional strategies should be consistent with relevant educational best practices, and lecture shall be kept to a minimum.

5. Institutions are encouraged to include plans for follow-up activities after the Summer Academies have concluded. Follow-up activities may include both post-Academy summer activities and activities that involve the students' teacher, classmates and school during the fall semester.

6. Summer Academy activities shall be age-appropriate for student participants. Expectations of a college student may not be appropriate for a Summer Academy student.

    a) Summer Academy students, as minors, will typically not exhibit the same level of maturity and sophistication as college students in areas such as personal safety, politics, religion, sex, and other personal behaviors and should not be expected to conduct themselves as adults. In this regard, legal guardians must be contacted in emergencies and be involved in any conduct concerns.

    b) The Summer Academy director must keep the students under the appropriate level of supervision for their age and exercise reasonable academic judgment when addressing sensitive issues.

B. Recruitment and Selection

Each Summer Academy will establish student recruitment, application and selection processes, as well as criteria for each proposed Summer Academy. Recruitment, application and selection processes must be outlined in the proposal.

1. As stated in Section II.B, Summer Academies should emphasize recruitment of student participants from subgroups most likely to be underserved in STEM fields.

2. Summer Academy student participants must be Oklahoma residents. Institutions may not restrict applications or acceptances to any specific geographical area within Oklahoma.

3. Applicants must be entering the eighth through twelfth grades in the fall semester following the Summer Academy. Each Summer Academy will establish the targeted grade levels for the proposed Summer Academy.

4. Programs may be either commuter or residential or a combination of both.

5. No early student selection processes are allowed. This requirement is in place to ensure **equitable access of all students in Oklahoma** to the Summer Academies.

   a) Applications for student participants must open no later than March 1 each year of the grant.

   b) Student selection may begin no earlier than April 1 each year of the grant. Summer Academy directors who violate this requirement may place current and/or future Summer Academy funding in jeopardy.

   c) In an effort to level the field for student applicants, students who apply early may not be given preference or priority in the selection of Summer Academy participants. Each year of the grant, all students who apply on or before the April 1 selection date must be treated equally, regardless of date of application completion.

6. Institutions of Higher Education must abide by all applicable state and federal laws as well as State Regents' grant policies and fiscal procedures.

C. Program Evaluation

Proposals must contain an evaluation design that includes both short- and long-term goals and objectives with measurable benchmarks of success. Summer Academy programs may be externally evaluated, but due to limited funding, external evaluation is not a priority.

D. Successful Outcomes Dissemination Plan

Proposals must contain a dissemination plan that includes strategies to inform local and state communities about the outcomes and success stories of the Summer Academy. It is strongly encouraged that Summer Academy directors and their affiliated institutions submit press releases after the conclusion of the Summer Academy to local and state media outlets. Other recommended strategies include setting time aside near the end of programs for students to write letters to their elected officials or local newspaper about their experiences. Creativity in this area is encouraged.

E. Fiscal, Legal and Accountability

1. Higher education institutions will apply all generally accepted fiscal Standards for Internal Controls in the Federal Government to all grant program fiscal practices.

2. Upon the grant award announcement each year of the grant, all grant recipients will participate in a mandatory directors' orientation meeting provided by the State Regents' administrative staff.

3. Partnerships with Oklahoma businesses, industries, and community and nonprofit organizations are strongly encouraged in order to provide relevant work experiences for students.

4. Multi-institutional proposals are encouraged. One eligible applicant as defined in Section IV will be the fiscal agent for the grant.

5. Institutional support, in-kind support and flexibility to support Summer Academy activities and the needs of adolescents are encouraged.

6. Leveraging other funding sources to enhance program services is encouraged.

7. **No funds for any activities may be solicited or received from the students, their parents, or legal guardians.**

8. Each institution is required to stand behind the liability of its Summer Academy program, including the selection process for student participants in the Summer Academy. The institution will, to the extent permitted by Oklahoma law, indemnify the State Regents and/or the Chancellor for any liability they may incur as a result of the institution's Summer Academy.

9. Applicants should be aware of the following information relative to funding:

   a) Each approved grant program may receive (per year), as funding permits, up to:

      (1) **$175** per full-time-equivalent (FTE) student per day for commuter academies and
      (2) **$200** per FTE student per day for residential academies.
      (3) One FTE student day will equal one student attending six hours or more per day.

   b) Funding is limited to two FTE student weeks per session.

   c) A Summer Academy not filling proposed/funded student slots may be asked to justify expenditures.

   d) Quality proposals will have a balance of personnel costs with respect to the total amount requested.

10. Ownership of copyrights and patents, or other proprietary interests that may result from program activities shall be governed by applicable state regulations and local institutional policies.

11. Institutions of higher education must abide by all applicable state and federal laws, and State Regents' grant policies.

VI. Proposal Evaluation Criteria

All grants will be awarded on a competitive basis. Funding for years two and three of each Summer Academy will be subject to availability of continued program funding and demonstrated performance from the previous year. All responses to this announcement which satisfy minimum eligibility criteria as defined in Section IV will be evaluated by an independent grant review panel on the basis of established criteria and priorities. The committee's recommendations will be made to the Chancellor who will, in turn, make recommendations to the State Regents for funding.

A. The review panel may consist of representatives from (1) higher education institutions, (2) elementary and secondary schools, and (3) other organizations having relevant expertise. The evaluation rubric used by reviewers is found in Appendix B, Summer Academy Grant Proposal Reviewer Rating Form.

B. The Staff Onsite Evaluation Form, found in Appendix B, may be helpful in understanding what the State Regents are looking for in the Summer Academy program.

C. In reviewing Summer Academy proposal applications, the State Regents may consider previous Summer Academy program performance, including but not limited to conformance to applicable Summer Academy Guidelines and Procedures, timeliness of compliance with applicable reporting requirements and funding expenditures, and site visit evaluations. Poor past performance may result in one of the following actions:

   1. Imposition of special conditions relating to previous performance may be applied to the funded Summer Academy, and may include, but are not limited to, additional reporting, additional financial oversight, and increased site visits; or

   2. Proposal applications may be rejected without further consideration.

D. In reviewing Summer Academy proposal applications, the State Regents staff may provide recommendations to adjust proposed academy details to better align proposed academy objectives and structures with grant criteria and requirements.

VII. Grant Administration Guidelines

A. Fiscal Procedures

1. All documents relating to the program should be assigned to individual accounts/files that can be readily identified and verified. Once a proposal has been approved, payment will be made to the sponsoring institution with a 50 percent (of approved budget) disbursement by April 30 each year of the grant and the second 50 percent disbursement by June 30 each year of the grant. For public institutions, payment will be made by electronic wire transfer. For private institutions, payment will be made by warrant.

2. Authorization to modify the program in any way must be approved by the State Regents' staff acting upon an e-mail request from the Summer Academy director. In addition to authorization to modify the program, the shifting of funds between budget categories of the program will require written permission of the State Regents' staff if the change is greater than ten percent of the budget category.

3. Eligible expenditures will ordinarily be limited to those directly necessary and essential to the accomplishments of the proposed program. This will customarily include personnel costs, consultant fees, materials and supplies, travel, communications, printing, and student participants' room and board (see Appendix A for the required format).

   a) Due to the limited availability of funds, indirect administrative expenses will not be allowed.

   b) Due to the limited availability of funds, travel to professional conferences by institution faculty or staff will not be an allowable grant expense.

B. Evaluation of Summer Academies and Required Reports

The progress of each funded Summer Academy will be evaluated by State Regents staff through a combination of final report, interim report, student surveys and/or site visits.

1. The final reports must be submitted via O-SAFE secure file transfer to the Oklahoma State Regents for Higher Education by **the required due date; the Participant Report and Final Written Report are due within 21 days of the final academy date, and the Final Report of Expenditures is due on September 1 each funded year**. Failure to submit the final report in the required format and by the due date may impact future Summer Academies funding (see VI. C.).

2. The final report must include:

   a) Final Report of Expenditures - Download the Excel template (shown in Appendix C) here: [Final Expenditures Report](). This report must be submitted as an electronic Excel file.

   b) Participant Report - Information required in this report is provided in Appendix C. Download the Excel template here: [Final Participant Report](). **Participant Report must be submitted through Secure File Transfer (O-SAFE) Protocol.**

   c) Final Written Report - Use Microsoft Word and include the following:

     (1) Briefly describe how you recruited students from underserved areas (no more than one paragraph).
     (2) Briefly summarize Summer Academy activities and students' responses to activities (no more than three pages).

        (3) Include an evaluation of the effectiveness of your Summer Academy program as measured against the program's objectives (no more than three pages).

        (4) Describe how your program met the Summer Academies Absolute Priorities (found in Section II). If your program did not address an absolute priority, please explain why (no more than one page).

        (5) Describe any challenges you encountered in the planning and execution of your Summer Academy (no more than one paragraph).

        (6) Include any published material relating to the Summer Academy program.

C. An Interim Report may be requested by the State Regents. If requested, the report will be an assessment of the progress of the Summer Academy, in the same format and with similar content as the Final Report.

D. All Summer Academy student participants will be required to complete a short online pre- and post-survey each year of the grant (provided by the State Regents) in order to measure successes and acquire student feedback.

E. State Regents' staff are permitted to make recommendations, modifications, and revisions to any public-facing academy materials upon award approval.

F. A Summer Academy site visit by State Regents' staff may be scheduled. See Staff Onsite Evaluation Form, Appendix B.

VIII. Proposal Format

A. The proposal must be electronically submitted through the Online Submission Form (See Appendix A).

1. Summer Academy proposal introduction with contact information, previously found on the Proposal Cover Sheet.

2. Overview (80 - 100 words) - The Overview will provide the initial link to your Summer Academy on the State Regents webpage. Your Overview is the advertisement for your Summer Academy, and it should be appealing to the students you are targeting for recruitment. Include correct contact information and/or link to apply at the end of the Overview.

3. Proposed Budget - Use the budget template provided on the Summer Academies website and upload it within the Online Submission Form. The budget should reflect the requirements of the proposed activities. Only one year of budget needs to be included on the proposed budget template. Years two and three are expected to mirror the first year's budget as much as possible, with only minor adjustments allowable.

4. Narrative – This should be created in Word and uploaded within the Online Submission Form. This section of the application document should fully describe the key elements of the proposed program. It is essential that each of these subjects be addressed in the order presented here and the topics be clearly identified in the text of the proposal. The grant team is encouraged to carefully review the evaluation rubrics in Appendix B of this packet for helpful information in designing the total Summer Academy experience and formatting the proposal. The narrative should be limited to eight pages, double-spaced, 12-point font and must include:

    a) Overview – Please restate the Overview as the initial paragraph of your Narrative - see Section VIII.A.2 above.

    b) Primary Goal - Explain the goal of your Summer Academy and how that goal is consistent with the Summer Academy Absolute Priorities as written in Section II. Explain how the goal is appropriate for your targeted students.

c) Population – Describe the populations to be served.

d) Objectives - The objectives should be clearly articulated in measurable terms and be relevant to the population to be served.

e) Key Academic and Enrichment Activities - Describe the daily schedule and proposed activities for the Summer Academy. Demonstrate how these activities are consistent with Summer Academy Absolute Priorities in Section II.

f) Administrative Plan - Identify key personnel, their qualifications and responsibilities. Demonstrate that each key personnel member has adequate training, expertise and experience to support the activities being proposed. Show that adequate facilities for instruction and lodging (if needed) are provided. Explain appropriate and adequate supervision of student participants including the adult/student ratio for various activities.

g) Recruitment and Selection of Student Participants - Describe the specific recruitment plan of the targeted population as defined in the Summer Academy Guidelines, Section V A-E. Describe information to be required in the student participant application and discuss the relevancy between required information and planned learning experiences. Refer directly to Section V. B. Recruitment and Selection when explaining evaluation criteria. Consider using methods other than GPA as qualifying standards. Requesting a list of references or recommendation letters is a permissible application requirement. However, keep in mind that students attending large schools may not be known by the school principal; therefore, a letter of recommendation from the principal is unrealistic. Consider a letter of recommendation from a teacher, coach or youth leader.

h) Student Participant Selection - Describe the selection criteria and process that will be used to choose student participants if more applications are received than can be invited.

i) Program Evaluation - The anticipated outcomes of the program should be fully enumerated. The proposed method for determining the efficacy of the program should be provided.

j) Successful Outcomes Dissemination Plan - Include a plan for dissemination of the Summer Academy's outcomes to local and state communities. Refer to Section V.D for details.

k) Budget and Institutional Support - The proposal budget should align with the Summer Academy Priorities and Guidelines, be appropriate for the scope of the proposal, and demonstrate efficient use of state resources. Provide a budget justification that explains why each expenditure type on the budget sheet is necessary to achieving your Summer Academy goals, including the number of personnel and salary justifications in the context of their institutional salaries. The budget justification should detail the kinds of institutional support that will be necessary to sustain the proposed activity. Institutional support might include transportation, office space, clerical staff, library resources, computer facilities, audio-visual equipment or other types of educational hardware as well as flexibility to support needs of Summer Academy activities and needs of adolescents. The budget justification should also list any other program funding sources, direct or in-kind.

5. Summer Academy Student Application - Submit an electronic copy of your student application.

6. Professional Staff - Submit a brief vita (one to two pages) of each professional staff member to be associated with the program. Clearly identify the position and amount of time that each person will fill in the program.

B. The following items require the signature of the institutional president or designee. The application will NOT be processed without these appropriately executed documents.

7. Letter of Institutional Support

8. Statement of Assurances

9. The Recipient Commitment Form

G. Submission of Proposal

1. All proposals must be electronically submitted via online application process by September 15, 2023 at 5:00 p.m. CST. No hard copy proposals will be accepted.

Appendix A

The following will be prepared and submitted via the Summer Academy Online Submission Form (screenshots provided below for your convenience) no later than 5:00 P.M. CST on September 15, 2023:

- Summer Academy Information (Name/Title/Contact information/Dates, etc.)
- Overview (It is recommended to type this in Word and paste into Submission form)
- Proposal Budget
- Signed Statement of Assurances
- Signed Recipient Commitment Form
- Signed Letter of Institutional Support
- Proposal Narrative
- Professional Staff Brief Vitae
- Student Participant Application Questions and Requirements

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Proposal Online Submission Form

OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION
Improving our future by degrees

2024 STEM Summer Academy Submission Form

NOTE: This form cannot be saved and should be completed in its entirety at one time. For longer responses, it is recommended that you copy/paste from another document.

Any information provided in this form may be published on the OSRHE website if the academy is selected.

Introduction Information

1. Name(s) of submitting higher education institution(s) *

2. Name of branch/campus *

List city, state

3. Mailing address of submitting higher education institution *

Include dept/unit, street address/P.O. Box number/city, state, zip code

4. Name of proposed academy *

5. Topic of proposed academy *

6. Dates of proposed academy(ies) *

7. Targeted grades (Check all that apply.) *

- ☐ 8th Grade   ☐ 9th Grade   ☐ 10th Grade   ☐ 11th Grade
- ☐ 12th Grade

8. Total number of students to be served *

If proposal is for same academy offered twice, provide total sum of all students.

9. Type of academy *

Select or enter value   ▼

10. Total State Regents requested funds for 2024 *

11. Total other funds for 2024

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12. Academy Director - Contact Information

Academy director contact information is required for submission.

Academy director title/honorific *
(e.g Dr. Mr. Mrs. Ms.)

Academy director first and last name *

Academy director phone number *

🇺🇸 ▾ +1 (___) ___-____

Academy director phone extension

Academy director email address *

13. Co-Director/Alternate - Contact Information

At least one co-director or alternate is required for submission.

Please choose one: *

Select ▼

Title/honorific *

(e.g Dr. Mr. Mrs. Ms.)

···

First and last name *

Phone number *

🇺🇸 ▼	+1 (___) ___-____

Phone extension

Email address *

14. Co-Director/Alternate - Contact Information

At least one co-director or alternate is required for submission.

Please choose one:

Select ▼

Title/honorific

(e.g Dr. Mr. Mrs. Ms.)

···

First and last name

Phone number

🇺🇸 ▼	+1 (___) ___-____

Phone extension

Email address

15. Overview

(Maximum 100 words) Should be a clear, concise description of the academy, including title and content focus, as well as how the student applies. We prefer a link to the application. The overview will provide the initial link to your Summer Academy on the State Regents webpage. Your overview is the advertisement for your Summer Academy, and it should be appealing to the students you are targeting for recruitment. Include contact information and/or link to apply at the end of the overview.

Project overview *

[text box]

16. Additional Documents

This is a list of required documents to be uploaded in the box below.

1. Summer Academy Budget - The template for this budget can be found at
https://www.okhighered.org/grant-coordination/osrhe-grants.shtml#sa

2. Summer Academy Statement of Assurances - Signed - The template for this can be found at https://www.okhighered.org/grant-coordination/osrhe-grants.shtml#sa

3. Recipient Commitment Form - Signed - The template for this can be found at https://www.okhighered.org/grant-coordination/osrhe-grants.shtml#sa

4. Proposal narrative

5. Letter of institutional support

6. Professional staff brief vitae

7. Student participant application questions and requirements - Please upload your student application; if your student application is not yet completed, please upload a document with the questions you plan to ask your applicants as well as any requirements you may have.

Please upload the seven supporting documents: *

Drag and drop files here or browse files

☐ **Summer Academy Budget is uploaded.** *

☐ **Signed Summer Academy Statement of Assurances is uploaded.** *

☐ **Completed and Signed Recipient Commitment Form is uploaded.** *

☐ **Proposal narrative is uploaded.** *

☐ **Signed letter of institutional support is uploaded.** *

☐ **Professional staff brief vitae is uploaded.** *

☐ **Student participant application questions and requirements are uploaded.** *

☐ Send me a copy of my responses

Submit

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Proposal Budget

Summer Academy Budget

CONTACT INFORMATION	
Name of Academy:	
Institution:	
Year of Academy:	
Director(s) Names:	
Director(s) Emails:	
Preparer(s) Name:	
Preparer(s) Email:	
Preparer(s) Phone #:	

BUDGET ALLOCATION INFORMATION			
		Type of Expenditures	Total Funds Budgeted
	1	Personnel	
		Professional Personnel (including fringe)	$0.00
		Support Personnel (including fringe)	$0.00
		Consultants	$0.00
		TOTAL PERSONNEL	$0.00
	2	Summer Academy Materials & Supplies	$0.00
	3	Communication Expenses	$0.00
	4	Travel Expenses	$0.00
	5	Printing and Binding	$0.00
	6	Student Participants	
		A. Lodging	$0.00
		B. Meals	$0.00
		C. Transportation	$0.00
		D. Incentives	$0.00
		E. Other - specify	$0.00
		TOTAL STUDENT PARTICIPANTS	$0.00
	7	Data Processing	$0.00
	8	Other Contractual & Other Current Expenses	$0.00
		TOTAL OTHER	$0.00
		TOTALS	$0.00

COST PER STUDENT & PER DAY		
	TOTALS	$0.00
9	NUMBER OF STUDENTS (TOTAL)	
	Total sum of all students from all sessions	
10	NUMBER OF SESSIONS	
	Sessions are number of times academy is offered, if only offered once please put "1"	
11	SINGLE ACADEMY LENGTH--IN DAYS	
	Length of one session of the academy.	
	COST PER STUDENT	$0.00
	COST PER DAY	$0.00
	COST PER STUDENT/PER DAY	$0.00
*Cost per student per day must not exceed $175 for commuter academies or $200 for residential academies		

Oklahoma State Regents for Higher Education

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Statement of Assurances

Proposal Title: _____

Program Director(s): _____

Institution: _____

1. The higher education institution will comply with all provisions of the Oklahoma State Regents for Higher Education *Guidelines and Procedures for Summer Academies for Science, Technology, Engineering, and Mathematics*.

2. Funds awarded under the contracts will be used to enhance and supplement, but not duplicate, conventional or advanced high school science, technology, engineering, and mathematical studies.

3. The higher education institution will maintain quality fiscal control of funds. A copy of all contracts, invoices, paid claims, and other data shall be kept in a separate file.

4. The higher education institution will comply with state audit requirements.

5. At the termination of this program, any unobligated funds will be refunded to the Oklahoma State Regents for Higher Education. Public institution unobligated funds will be refunded by transfer. Private institutions will pay by check.

6. The higher education institution will provide all data, reports, and information determined necessary by the Oklahoma State Regents for Higher Education.

7. The higher education institution assures that students participating in the Summer Academies will be Oklahoma residents and will be in the eighth through twelfth grades in school the fall following the Summer Academy.

8. If funded, the higher education institution will initiate, conduct, and complete the activities as specified in the application unless changes are approved by the Oklahoma State Regents for Higher Education.

9. The institution stands behind its Summer Academy program, including the selection process for participants in the Summer Academy. To the extent permitted by Oklahoma law, the institution agrees to indemnify the Oklahoma State Regents for Higher Education for any liability they may incur as a result of the institution's Summer Academy. As president, I certify that the Summer Academy and the selection of participants for the Summer Academy will comply with applicable state and federal law.

10. All final reports must be submitted by the stated deadlines.

I, _____, AGREE TO CONDUCT THIS
          Printed name of Institutional President or Designee

SUMMER ACADEMY PROGRAM LAWFULLY AND UNDER THE TERMS INDICATED ABOVE.

_____
        Signature of Institutional President or Designee   Date

Please upload a signed PDF copy to the online proposal submission form.

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Recipient Commitment Form

Each Recipient will complete this form when submitting a proposal to Oklahoma State Regents for Higher Education (State Regents) Summer Academies for Science, Technology, Engineering, and Mathematics program. This form provides a checklist of documents and certifications required by grant recipients, as well as an area for the authorized institutional representative to sign.

Recipient Legal Name: _____

Recipient Unique Entity Identifier (or DUNS# if no UEI): _____

Proposal Title: _____

Recipient Total Funds Requested: _____

Recipient Period of Performance: BEGIN: _____   END: _____

The following documents are included in our award proposal submission and covered by the certifications below: ____ Proposal *(required)*   ____ Budget and Budget Justification *(required)*

1. Institutional Grant Policy
____ Our institution abides by a current official grant policy. The policy is located at_____
_____ and was updated on (date)_____. (If the policy is not publicly available online, a copy of it must be furnished in addition to this form.)

2. Human Participants
____ Yes____ No   If *yes*, indicate the status of IRB Review (must be current):
Pending or Date IRB determined research to be exempt or approved: _____ IRB Number: _____
If *yes* and NIH funding is involved:
____ Yes____ No   Have all key personnel involved completed Human Subjects Training?

3. Animal Subjects
___ Yes ___ No   If *yes* indicate the status of IACUC Review (must be current):
Pending or Approval Date: _____ IACUC#: _____

4. Conflict of Interest
____Recipient hereby certifies that it has an active and enforced conflict of interest policy that is consistent with the provision of 42 CFR Part 50, Subpart F "Responsibility of Applicants for Promoting Objectivity in Research."
____Recipient also certifies that, to the best of Institution's knowledge, all financial disclosures have been made related to the activities that may be funded by or will have been satisfactorily managed, reduced or eliminated in accordance with recipient's conflict of interest policy prior to the expenditures of any funds under any resultant agreement.

5. Responsible Conduct of Research

____Recipient organization/institution hereby certifies that it will ensure that all undergraduates, graduate students, and postdoctoral researchers who will be supported by this proposal will be trained in the responsible and ethical conduct of research.

6. Cost Sharing/Matching/In-Kind

____Yes ____ No   Amount: _____

(Cost sharing, Matching, and/or In-Kind amounts and justification shall be included in the recipient's budget.)

7. Certification Regarding Debarment and Suspension

____ Yes ____ No   Is the Recipient Organization, Director or any other employee or student participating in this project debarred, suspended or otherwise excluded from or ineligible for participation in federal department, agency, assistance programs or activities? (If *yes,* please explain in Comments section below.)

8. Export Control

____ Recipient is individually responsible for maintaining its compliance with federal export laws and procedures.

By checking this box, Recipient certifies that an export control officer, or other authorized person, has reviewed the Recipient's proposal for compliance with federal export control laws. (Explain potential problems in the comments section below.)

____ N/A

9. Nondiscrimination

____ Recipient will comply with all state and federal laws relating to nondiscrimination. Those include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.

10. Mandatory Violation Disclosures

____ Recipient is individually responsible for a procedure for disclosing *in a timely manner, in writing to the State Regents all violations of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting this award.*

11. Fiscal Responsibility

_____ Yes _____ No   Recipient certifies that its financial system is in accordance with generally accepted accounting principles.

_____ Yes _____ No   Recipient has the capability to identify, in its accounts, all awards received and expended and the programs under which they were received.

_____ Yes _____ No   Recipient maintains internal controls to assure that it is managing awards in compliance with applicable laws, regulations and the provision of contracts or grants.

_____ Yes _____ No   Recipient complies with applicable laws and regulations.

_____ Yes _____ No   Recipient can prepare appropriate financial statements, including the schedule of expenditures of awards.

_____ Yes _____ No   There are no outstanding audit findings which would impact contract costs. If there are findings, submit a copy of the most current report that describes the finding and steps to be taken to correct the finding.

Comments:

Approved by Recipient:

The information, certifications, and representations above have been read, signed and made by an authorized official of the recipient named herein. The appropriate programmatic and administrative personnel involved in this application are aware of sponsor policy in regard to awards and are prepared to establish the necessary inter-institutional agreements consistent with those policies. Any work begun and/or expenses incurred prior to execution of an award agreement are at the recipient's own risk.

_____
        Signature of Institutional President or Designee   Date

_____
        Printed name of Institutional President or Designee

Please upload a signed PDF copy to the online proposal submission form.

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Letter of Institutional Support

You may use this template for your Letter of Institutional Support, or you may create your own. Please submit on institutional letterhead.

Dear Chancellor Garrett,

I am pleased to write this letter in support of [Institution]'s Summer Academy proposal, [name of Summer Academy], administered by the Oklahoma State Regents for Higher Education. Our Summer Academy program will provide Oklahoma students with engaging instruction in the areas of science, technology, engineering, and mathematics. In addition, student participants will experience life on a college campus and learn to plan for higher education opportunities.

To ensure that the goals of our Summer Academy are met, [director(s) name(s)] will lead the program team. [Institution] staff will ensure that facilities for activities and lodging [if applicable] fully support student participants. Qualified instructors will provide engaging educational experiences that will motivate students to continue learning when they return to their local schools.

[Concluding sentences: partnerships with local businesses/organizations, success of past Summer Academies, etc.]

Best regards,

[Institutional President or Designee]

Appendix B

- Summer Academy Grant Proposal Reviewer Rating Form
- Regents Staff Onsite Evaluation

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Reviewer Rating Form

SUMMER ACADEMY GRANT PROPOSAL REVIEWER RATING FORM

Academy Name: _____   Commuter - Residential (indicate one)

Points will be awarded for each item based on the following scale:
In the proposal this area needs development=1, sometimes meets expectations=2, meets expectations=3, sometimes exceeds expectations=4, always exceeds expectations=5. Sections worth 10 points can use this scale but double point value (2, 4, 6, 8, or 10).

Awarded	Possible	Alignment with Summer Academy Priorities and Guidelines – Total of 35 points
	5	The goal of the Academy is clearly stated, consistent with the Summer Academy Priorities and Guidelines, and appropriate for targeted students with particular emphasis on those most likely to be underserved in science, technology, engineering and mathematics (STEM).
	5	The Academy daily schedule provides stimulating, challenging and relevant STEM learning opportunities, including hands-on and experimentation. **Priority 1, 1a**
	5	Academy activities are designed to develop student awareness about the need to plan for college through information about college admissions, OK Promise, OKCollegestart.org, Pell Grants, and other opportunities. **Priority 2b**
	5	The Academy fully exposes student participants to the experience of living on a college campus or attending as a commuter student. **Priority 2c**
	5	The proposal links success in college with accomplishment in Academy STEM activities and eventual high school core course-taking. **Priority 1b, 2a**
	5	The proposal provides opportunities for exploration of careers and areas of study at post-secondary institutions. **Priority 2a, 2c**
	5	The proposal demonstrates partnerships with Oklahoma business and industry and/or relevant community and nonprofit organizations through which relevant work experiences are brought to students. **Priority 2c**

Comments:

Awarded	Possible	Administrative Plan – Total of 20 points
	5	Key personnel are identified with their qualifications and Academy position included.
	5	Appropriate expertise (higher education faculty, K-12 teachers, industry experts, and high school/college students) is available to support the proposed activities.
	5	Adequate facilities have been arranged to accommodate instruction and lodging (if residential).
	5	The proposal contains a plan for supervision of students.

Comments:

Awarded	Possible	Recruitment and Selection of Participants – Total of 20 points
	10	The recruitment and selection process is clearly described, consistent with Summer Academy Priorities and Guidelines and equitable to all students.
	5	The student application process is clear and is not cumbersome for underserved students.
	5	The Academy Overview is engaging and exciting in order to appeal to targeted students.

Comments:

Awarded	Possible	Budget – Total of 10 points
	5	The budget is aligned with the Summer Academy Guidelines and Procedures.
	5	The budget is appropriate for the scope of the proposal and demonstrates institutional support and leveraging of other funding sources.

Comments:

Awarded	Possible	Project Evaluation – Total of 10 points
	5	The proposed project outcomes and their assessments are clearly identified and sound.
	5	The methods and timelines for data collection, program review, and dissemination are clearly specified.

Comments:

Awarded	Possible	Proposal Quality – Total of 5 points
	5	The proposal is well written and organized. Directions were followed. Deadlines were met.

Comments:

	Possible	
	100	TOTAL EVALUATION SCORE

Comments:

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Staff Onsite Evaluation

Summer Academies Onsite Evaluation Form

Condensed Questions for Printing

Student Questions

This first group of questions is to ask of the students directly. Please make sure you set aside some time during your visit to address these questions. Include as many students as possible in this discussion to obtain a variety of perspectives.

1. Would you all recommend this Summer Academy to your friends? Why or why not?
2. What do you think of STEM fields now that you have attended this academy? Would you say you are 1) excited to learn more about STEM, 2) have found out you're not that interested in STEM, or 3) haven't really changed opinions about STEM?
3. Did this academy increase your interest in studying STEM careers or declaring a STEM major in college?
4. Do you have a lot of opportunities to practice what the instructor teaches with hands-on experiments, technology, or discussion? Do you have to think of ways to solve different problems?
5. Tell me about your experience being on a college campus.

Director Questions

This next group of questions is to ask of the director(s). Please make sure you set aside some time during your visit to address these questions.

1. Where/how did you recruit students?
2. What were your methods on recruiting underserved students, and how successful were you?
3. What are your plans for dissemination of academy information—letter writing campaign, Newspaper, etc.?
4. Please provide information about how you approached curriculum design for this Summer Academy. Include contributions from any outside guest instructors.
5. Were there any unexpected challenges in executing your Summer Academy plans this year? If so, how did you address them?
6. Are there any additional areas where State Regents staff can support your efforts with this Summer Academy?

Overall Evaluator Impressions

1. What are your overall impressions and takeaways from this Summer Academy?
2. Are there any areas of improvement to be made that you have noted in your observations or conversations with students and/or the director(s)?

Appendix C

Final Reporting
- Final Report of Expenditures
- Participant Report
- Written Report

Each year of a funded Summer Academy, the Written Report and Participant Report are due 21 days following the last academy date; Final Report of Expenditures will be due September 1 of each funded year. All final reporting will be submitted to OSRHE through O-SAFE (Secure File Exchange System). Click here for instructions on O-SAFE.

Oklahoma State Regents for Higher Education

Summer Academies for Science, Technology, Engineering, and Mathematics
Final Report of Expenditures

Summer Academy Final Report of Expenditures

CONTACT INFORMATION	
Name of Academy:	
Institution:	
Year of Academy:	
Total Number of Students Served:	
Number of Sessions (Number of times academy is offered, if once please put 1):	
Length of a Single Academy in Days:	
Director(s) Names:	
Director(s) Emails:	
Preparer(s) Name:	
Preparer(s) Email:	
Preparer(s) Phone #:	

BUDGET ALLOCATION INFORMATION			
		Type of Expenditures	Total Funds Spent
	1	Personnel	
		Professional Personnel (including fringe)	$0.00
		Support Personnel (including fringe)	$0.00
		Consultants	$0.00
		TOTAL PERSONNEL**	**$0.00**
	2	Summer Academy Materials & Supplies	$0.00
	3	Communication Expenses	$0.00
	4	Travel Expenses	$0.00
	5	Printing and Binding	$0.00
	6	Student Participants	
		A. Lodging	$0.00
		B. Meals	$0.00
		C. Transportation	$0.00
		D. Incentives	$0.00
		E. Other - Name Badges	$0.00
		TOTAL STUDENT PARTICIPANT	**$0.00**
	7	Data Processing	$0.00
	8	Other Contractual & Other Current Expenses	$0.00
		TOTAL OTHER**	**$0.00**
		TOTALS**	**$0.00**

TOTAL COST CALCULATIONS		
	TOTAL FUNDS SPENT**	$0.00
9	**TOTAL REQUESTED FUNDS**	$0.00
	ACTUAL COST/STUDENT/DAY**	$0.00
	TOTAL SURPLUS FUNDS**	$ -

**Cell will autopopulate using a formula, please do not adjust. If total surplus funds exceeds $500, surplus must be refunded to OSRHE. For more information, email Annette Long at along@osrhe.edu.

Submit by September 1 via the O-SAFE Secure File Exchange.

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Participant Report

The Participant Report Excel template can be found at:

Participant Report Excel Template. This template is used to record participant data to help us ensure that Summer Academy outcomes continue to align with stated goals. An example of how to fill out the template can be found below, along with a directions key.

Last Name	First Name	M	Birthdate yyyymmdd	SSN	Address	City	Zip	County	School Name	Location of School	Pub/Prv/ Homesch	Gender	Grade Entering	Race
Smith	John	A	19980124	444-44-4444	222 E Okla St	Tulsa	73570	Tulsa	Carl Albert	Tulsa	Pub	M	11	AI/AN
Doe	Jane	Q	20030628	222-22-2222	Rt 1, Box 44	Sallisaw	72727	Sequoyah	Sallisaw	Sallisaw	Pub	F	12	W
Grey	Marvin	L	20021026	333-33-3333	212 E Cyprus	Okla. City	73705	Oklahoma	NW Classen	Okla. City	Home	M	9	H
Webster	Daniel	T	20001113	111-11-1111	Box 222222	Tipton	73733	Tillman	Tipton	Tipton	Prv	M	10	A

KEY:

Name: Please enter last name, first name, and date of birth in the format specified (yyyymmdd) with no separation between the numbers.

SSN: Enter the Social Security Number as specified in the example with dashes.

Address: Make sure to separate the address, city, and zip, and include the county in which the participant lives

Location of the School: This should be the name of the city in which the school is located.

School type abbreviations: Pub=Public School, Prv=Private School, Homesch=Homeschool

Gender: M=Male, F=Female

Grade Entering: Please enter the grade level the student plans to enter in the fall semester following the academy.

Race: B = Black/African American; AI/AN = American Indian/Alaska Native; W = White; H = Hispanic/Latino; A = Asian; NHOPI = Native Hawaiian/Other Pacific Islander; Two = Two or more races; PNR = Prefer not to respond or none of these apply

Submission due within 21 days following the last academy date.

Oklahoma State Regents for Higher Education
Summer Academies for Science, Technology, Engineering, and Mathematics
Final Written Report

The Final Written Report is a narrative summary addressing the points outlined below. To maintain continuity of reporting, the preferred format is a standard size and type of font. Examples include: Times New Roman, Arial, Calibri, set at size 11-12.

The Final Written Report will:

1. Describe the process used to recruit students from underserved areas (no more than one paragraph).

2. Summarize the Summer Academy activities and student responses to activities (no more than three pages).

3. Include an evaluation of the effectiveness of your Summer Academy program as measured against the program's objectives (no more than three pages).

4. Explain how the program addressed/did not address the Summer Academies Absolute Priorities found in II A and B of the RFP. If your program did not address an absolute priority, please explain why. (No more than one page).

5. Describe any challenges encountered in the planning and execution of the Summer Academy (no more than one paragraph).

6. Include any published material relating to this Summer Academy program.

7. To help protect personal participant information, do not include computer discs, hard copies, shared drive files, or email attachments unless requested by State Regents staff.

Submission due within 21 days following the last academy date.