

Funding Well-Rounded Learning

A Guide to Well-Rounded Funding Requirements

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What is Well-Rounded Learning?

Well-Rounded learning can be defined and applied in many different ways, and has been a foundation of Oregon education for many years. The premise behind well-rounded education is to provide equitable, high-quality, and engaging opportunities to all students to grow their love of life-long learning and prepare them for success after graduation. As established in [Oregon's Consolidated Plan under the Every Student Succeeds Act](#), Oregon believes a well-rounded education moves beyond the courses students take, and into the essential knowledge and skills students are learning in those courses. A well-rounded education provides the knowledge and skills to live, learn, work, create, and contribute. It also ensures that each and every student is known, heard, and supported. Well-rounded education focuses on the whole student and their community, the learning experiences they are given, the knowledge and skills they learn, and the beliefs and attributes they develop.

Examples¹ of well-rounded education include: college and career guidance and counseling programs; programs and activities that use music and the arts; programs in Science, Technology, Engineering, and Math (STEM); accelerated learning; American history, civics, economics, geography, or government; foreign language; Career Technical Education; environmental education; programs that promote volunteerism and community involvement; and the integration of multiple disciplines.

In order to ensure districts are providing these opportunities for students, administrators should begin by examining their own district priorities and evaluating their impact toward providing equitable access to well-rounded learning opportunities for all students. In addition, each community has unique ideas and dreams around which well-rounded opportunities their youth need, and districts should work with their communities to develop strategies that embrace these values. Once a district has established its vision for well-rounded learning in partnership with its community, it is then time to begin thinking about all the ways in which funding can be used to support that vision.

Specific Funding Sources

Well-rounded education is broad, and there are many creative ways that schools and districts can apply funding to increase student access to well-rounded learning opportunities. The section below outlines some basic allowances and restrictions as well as an example of how funds could be used. Additional information about these funding sources can be found online at [ODE's ESEA/ESSA website](#), [ODE's Federal COVID-19 Stimulus Resources Page](#), [ODE's Federal IDEA Funding page](#), [ODE's Perkins V page](#), and [ODE's Innovation & Improvement Page](#). These funding sources listed below are the more common sources used for well-rounded education but are not the only options available.

¹ Section 4107 of the Every Student Succeeds Act (ESSA)

Title I-A²

General Allowances:

Title I-A funds supplement individual schools identified by the district. Each school receiving Title I-A completes a comprehensive needs assessment to create a school level plan. The school level plans are either "School Wide" or "Targeted Assistance" plans. Funds can be used for:

- Support for core academic subjects including English, reading or language arts, mathematics, science, world languages, civics and government, economics, arts, history, and geography.
- Positive behavioral supports, attendance incentive programs, parent/community engagement, and school climate interventions if needed to improve student achievement.
- Health, nutrition, and other social services if funds are not reasonably available from other sources and provided that the school has engaged in a comprehensive needs assessment and established a collaborative partnership with local service providers.

General Restrictions:

Title I-A funds can only be used for activities in buildings that receive Title I-A. Schools that operate a School Wide Plan can use Title I-A funds on all students, whereas Targeted Assistance Plan schools can only spend these funds on identified students.

Title II-A

General Allowances:

The purpose of Title II-A is to improve teacher and leader quality and focuses on preparing, training, and recruiting high-quality teachers and principals. Title IIA funds can be used to support a wide array of activities, such as recruiting more STEM teachers or providing bonuses for teachers to teach in hard-to-staff areas. These funds can also be used to train teachers on new instructional strategies, such as using arts integration to teach math.

General Restrictions:

Title II-A funds can only be used to support educator practice. Services or supports to students are not an allowable use of Title IIA funds. Additionally, districts have to ensure that Title II-A funds do not supplant state and local funds.

Title III

General Allowances & Restrictions:

Title III must supplement any local/state/or federal funds or activities. This is based on how the school district has previously used their funding. Title III funds can only be used to support instructional strategies for English Language Learners and cannot supplant other federal funding. These funds may be used to provide support for dual language.

² Note: Title funding requires a robust needs assessment process that should inform how schools and districts use these funds. It is important to begin with the needs assessment before developing a plan about how these funds should be used.

Title IV-A

General Allowances:

The purpose of the Student Support and Academic Enrichment (SSAE) grant program is to improve students' academic achievement by increasing the capacity of states, districts, schools, and local communities to:

- Provide all students with access to a well-rounded education;
- Improve school conditions for student learning; and
- Improve the use of technology in order to improve the academic achievement and digital literacy of all students.

General Restrictions:

Districts must prioritize SSAE funds to schools that:

- Have the greatest needs as determined by the district;
- Have the highest percentages or numbers of children navigating poverty;
- Are identified for comprehensive support and improvement under Title I;
- Are implementing targeted support and improvement plans under Title I; or
- Are identified as a persistently dangerous school under Section 8532.

Districts that receive \$30,000 or more in SSAE funds must, at least once every three years, conduct a comprehensive needs assessment of the following:

- Access to and opportunities for a well-rounded education for all students;
- School conditions for student learning to create a healthy and safe school environment; and
- Access to personalized learning experiences supported by technology and professional development for the effective use of data and technology.

Under ESSA, districts that receive \$30,000 or more in SSAE funds must spend:

- At least twenty percent on activities to support a well-rounded education;
- At least twenty percent to activities to support safe and healthy students; and
- At least some funds for activities to support the effective use of technology (no more than 15%).

Title IV-B

General Allowances:

21st CCLC Funds may be used to carry out a broad array of before and after school activities that advance student academic achievement and support student success, including:

- Well-rounded education activities, including such activities that enable students to be eligible for credit recovery or attainment;
- Programs that build skills in science, technology, engineering, and mathematics (STEM), including computer science, and that foster innovation in learning by supporting nontraditional STEM education teaching methods.

General Restrictions:

21st CCLC must supplement and not supplant other local, state, and federal funds. 21st CCLC must follow requirements under the Uniform Grant Guidance.

Title V-B

General Allowances:

The Rural and Low Income Schools (RLIS) and Small Rural School Achievement Program (SRSA) are designed to assist rural school districts in using federal resources more effectively to improve the quality of instruction and student academic achievement. These programs provide eligible districts with greater flexibility in using formula grant funds that they receive under certain state-administered federal programs.

General Restrictions:

SRSA grants are available to small and rural school districts. In order to be eligible, a school district must have fewer than 600 students and be defined as rural by the National Center for Education

With their Title IV-B funds, Klamath Falls School District created a CTE Graphic Design course with the objective of teaching students the print design business. The KU Print Shop Camp is a hands-on, project based graphic logo design class where students learn how to design, create, and print their own designs on t-shirts and sweatshirts. Students begin the class by learning basic graphic design theory to create their own logo designs. On the second day, using Affinity Designer, students take their designs and turn them into a vector drawing and learn how to export their files into the t-shirt print software. Finally, students take their designs (using the printer and hot press provided by this grant) to make their own t-shirts and sweatshirts. Students will earn elective credits for this camp.

Statistics (NCES) Locale Codes. Rural Education Achievement Program (REAP) districts will receive both a REAP allocation from ODE and an SRSA allocation from the US Department of Education (ED).

RLIS is available for rural school districts that serve concentrations of students navigating poverty. In order to be eligible, a school district needs to have 20 percent or greater census poverty and be defined as rural by NCES Locale Codes. Decisions about how to use the funds must be guided by a Needs Assessment.

Elementary and Secondary School Emergency Relief (ESSER) II & III

General Allowances:

These funds are designated for preventing, preparing for, and responding to COVID-19. This includes addressing the academic, social, and mental health impacts on students, including addressing unfinished learning. Any activity allowable under ESEA, IDEA, and Perkins is allowable under ESSER.

General Restrictions:

The Uniform Administrative Requirements, Cost principles, and Audit Requirements for Federal Awards (Uniform Guidance) applies. As with all federal awards, costs must be reasonable and necessary for the performance of the award. Travel is permitted only when reasonable and necessary

Winston-Dillard SD had a vision to expand music to every interested student in the district. Using ESSER Funds, this district constructed two buildings that would provide much-needed space for band and music programs. This facility upgrade freed up space that will eventually be used to expand classrooms and lower-class sizes in the district. They allocated over \$127,000 of ESSER funds to provide new instruments for students, repair instruments in poor condition, and make other improvements that would help grow their music program and broaden the horizons of our students. Read more about their project in [this ESSER III Newsletter](#).

for achieving a specific purpose, such as Professional Development. See 2 CFR Part 200 of the Uniform Administrative Requirements for more information.

Individuals with Disabilities Education Act (IDEA) Part B

General Allowances:

IDEA Part B funding is intended to help support the costs of providing a free, appropriate, and inclusive public education for children and youth, ages 3-21, that prepares them for further education, employment, and independent living.

- Part B Section 611: ages 3 – 21
- Part B, Section 619: ages 3 – 5, including kindergarten children who are 5

Funding is not restricted to use in separate classrooms or locations.

General Restrictions:

Usually IDEA funds can only be used to pay the excess, or extra, costs of educating students with disabilities.

- Excess costs are costs that exceed each district's average annual per student expenditure for elementary or secondary students in the preceding year.
- ODE's Office of Enhancing Student Opportunities (OESO) provides IDEA's formula and directions to districts annually so each one can calculate their own excess cost points.

Perkins

General Allowances:

For local grant recipients, Perkins has a number of allowable uses of funds related to improving CTE Programs of Study and/or career guidance activities supporting recruiting students as well as transitioning students to and from a CTE Program of Study:

- Develop, coordinate, implement, or improve career and technical education programs to meet the needs identified in the comprehensive needs assessment;
- Provide career exploration and career development activities through an organized, systematic framework that is connected to a state approved CTE Program of Study;
- Provide professional development for teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals;
- Provide within career and technical education the skills necessary to pursue careers in high-skill, high-wage, and in-demand industry sectors or occupations;
- Support integration of academic skills into career and technical education programs and Programs of Study;
- Plan and carry out elements that support the implementation of career and technical education programs and Programs of Study and that result in increasing student achievement of the local levels of performance;
- Develop and implement evaluations of the activities carried out with funds.

General Restrictions:

Restrictions, as well as additional information about allowable use of funds, can be found in the [Integrated Guidance Appendix H](#).

Additional Programs covered under the Integrated Guidance

General Allowances & Restrictions:

The [Aligning for Student Success: Integrated Guidance for Six ODE Initiatives](#) covers the following programs: High School Success (HSS), Student Investment Account (SIA), ESSA Partnerships, CTE - Perkins V, Early Indicator Intervention Systems (EIS), and Every Day Matters (EDM). In an effort to reduce duplication of information in this resource, we encourage you to see more specific information and details about allowable uses for each program in [Appendix H](#) of the guidance. Additionally, questions regarding the Integrated Guidance can be directed to ODE.EII@ode.oregon.gov.

Student Success Act (SSA) Summer Learning Grants

General Allowances:

The main program requirement is 60 hours of well-rounded, direct academic instruction connected to content standards. Allowances include:

- Staffing
- Transportation
- Supplies/Materials
- Field Trips
- Accommodations
- Professional Development
- Outreach/Engagement
- Communications

General Restrictions:

These funds go directly to schools based on a criteria formula. The summer program should be held at a selected school. SSA Summer programs must happen during the summer months. This program serves students entering Kindergarten through 8th grade (and may serve 8th grade going into 9th).

Additional Resources and Guidance for Funding

Listed below are additional resources and guidance for well-rounded funding options.

- [Examples of Leveraging ESEA and IDEA Funds for Digital Teaching and Learning from the Office of Educational Technology, US Department of Education \(2017\)](#)

Dufur Summer Programming partnered with Baker Technical Institute (BTI) in summer of 2022 to offer several CTE courses, braiding SSA Summer Learning funds with State Summer Learning grants. Six students took a three-week Heavy Equipment Operator course where the first two weeks were spent on high tech simulators of various heavy equipment such as excavators and dozers. The third week was spent on a land lab where students operated real heavy equipment that was provided in partnership with Crestline Construction. Other one-day classes included a Forklift Certification course, CPR/First Aid Certification, and ODOT Flagging certification. The program ended with a one-week introduction to a trucking course where students were introduced to the process of obtaining a CDL and operating a semi-truck. Next year, Summer Programming will again partner with BTI and will be focusing on healthcare, offering another CPR/First Aid Certification course in addition to a Wilderness search and rescue course and a four-week CNA certification course.

- [Federal Guidance for School Wide Programs \(2016\)](#)
- [Oregon Department of Education's Federal Funds Guide](#)
- [Title 1 Arts](#)
- [National Association for Music Education \(NAFME\) ESSER funding Toolkit \(2021\)](#)
- [Washington State Office of Superintendent of Public Instruction \(OSPI\) ESSA and Well-Rounded Education Guidance \(2019\)](#)

Common Grant Funders

Another option for funding well-rounded opportunities in schools is to seek out temporary grant funding. Grants can be a great way to pilot an innovative program or explore promising practices before committing to long-term, sustainable funding sources. Listed below are a few Oregon-based grant funders³ who have awarded grants to Oregon schools and districts.

- [Oregon Community Foundation](#)
- [Oregon Arts Commission](#)
- [Miller Foundation](#)
- [Portland General Electric Foundation](#)

In addition to these Oregon-based funders, some national funding sources include the [US Department of Education](#) and the [National Science Foundation](#).

Braiding Funding

A creative way to expand the use of funds is to consider braiding or blending funding sources to maximize the benefit of these funds for students. However, this process can be challenging. One of the most important elements to braiding funding sources is to consider the Supplement Not Supplant parameters of each funding source.

Supplement Not Supplant (SNS)

Considerations

- Districts and programs must show that federal funds did not replace state and local funding when administering a program (including summer programs).
- ESSER I, II, and III funds and SIA funds are **not** subjected to the SNS rules and considerations.
- Title Funding sources are supplemental and must not supplant local, state, or other federal funds. Districts will want to account for SNS provisions that apply to specific Title programs.


The Oregon Community Foundation (OCF) launched the Studio to School Initiative in 2014, investing over \$6 million to learn what it takes to design, implement, and sustain community-supported arts education programming in schools. During Studio to School, 18 arts education projects received five-years of funding and the support of a robust learning community. The projects brought together arts organizations and schools or school districts to expand and improve arts education programming for K-12 students in their communities. Read more about this program in their [Studio to School Summary Report](#).


³ This is not a comprehensive list and is being shared as a starting place for Schools and Districts to explore.

Next, consider the following steps when developing programs:

- Identify funding streams
- Identify eligible populations and compare requirements
- Build integrated data systems
- Align requirements of funding streams
- Develop shared goals and plan for collaboration
- Build programs using multiple funding streams
- Develop governance structures

Scenario for Funding a Well-Rounded Program Using Multiple Funding Sources

Listed below are some specific examples of well-rounded activities that could be implemented in a school and how a school might fund them, given the scenario provided. A green check mark () below indicates that funding activities within the designated category may be possible, but further information should be considered.

A red X () indicates that the funding source may not be used for the designated category, but exceptions may exist. Please see more specific information about each funding source following the table to determine eligibility of use. For the funding sources listed in the table below, all sources other than ESSER and SIA have [Supplement Not Supplant](#) requirements, and more details may be required to ensure proper use of these funds

Scenario: Through the needs assessment process, the district heard the community identify a lack of student voice and choice within their education and a desire for richer connections between content learned and real world experiences. The district has decided to implement a new STEAM-based Career Technical Education (CTE) pathway at the high school level, implement a career exploration rotation course at middle school level, and implement career-related experiences at the elementary level.

Table 1:

Activities	I-A ⁴	II-A	III	IV-A	IV-B ⁵	V-B	ESSER ⁶	IDEA	SIA	HSS ⁷	EIS	Perkins
Purchase of high-school curriculum approved for CTE STEAM-based Pathway	✓	✗	✗	✓	✓	✓	✓	✗	✓	✓	✗	✓
Professional Development for current educators for the high-school pathway content	✓	✓	✗	✓	✓	✓	✓	✗	✓	✓	✗	✓
Hire an additional teacher for the new course	✓	✗	✗	✓	✓	✓	✓	✗	✓	✓	✗	✗
Purchase or Pay for Translation of course content so that it is accessible for multilingual students and students requiring accommodations	✗	✗	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗
Purchase classroom materials for new middle school courses	✓	✗	✗	✓	✗	✓	✓	✗	✓	✓	✗	✗
Extend middle school career exploration opportunities into the migrant summer learning program	✗	✗	✓ ⁸	✗	✓	✗	✓	✗	✓	✓	✗	✓ ⁹
Purchase online supplemental curriculum for middle school courses	✓	✗	✗	✓	✓	✓	✓	✗	✓	✓	✗	✗
Pay for transportation costs for a job site visit, as part of the middle school career exploration program	✓	✗	✗	✓	✓	✓	✓	✗	✓	✓	✗	✗
Contract with and pay for services for a job professional to come into the elementary classroom weekly	✓	✗	✗	✓	✓	✓	✓	✗	✓	✗	✗	✓

⁴ Title I-A funds are only allowable in Title I-A buildings, and activities must be aligned to the school-level plan.

⁵ Title IV-B funds require that all activities take place in the hours when school is not in session and according to the grantees' approved award application.

⁶ ESSER II Funds must be obligated by September 30, 2023. ESSER III Funds must be expended by September 30, 2024.

⁷ HSS funds may only be used for 8th grade and above and for opportunities that are new since December 8, 2016.

⁸ Please follow Title III guidelines for students that are identified English Learners under Title III.

⁹ These exploration activities need to be tied to a secondary Program of Study.

For more detailed information on braiding funding, review the following resources:

- Office of the Assistant Secretary for Planning and Evaluation. U.S Department of Health and Human Services (2021). [Braiding Federal Funding to Expand Access to Quality Early Childhood Supports and Services: A Tool for States and Local Communities.](#)
- [Integrated Guidance \(Section 3\)](#)
- [Summer Learning Guidance](#) (Pages 29-33)
- [Oregon Federal Funds Guide](#), Appendix A (page 60)