APPENDIX H:
PROGRAM-BY-PROGRAM DETAILS

This section provides detailed information about the programs included in this guidance with a particular focus on allowable uses of funds. For more details on charter school eligibility and sponsorship, refer to the Partnering with Charter Schools Appendix.

▶ HIGH SCHOOL SUCCESS (HSS)

A. WHO IS ELIGIBLE

- School districts, public charter schools, virtual charter schools, YCEP and JDEP programs, and Oregon School for the Deaf serving students in grades 9-12.

B. PROGRAM AREAS

Funding is provided to establish or expand programs in three areas:

- Career and Technical Education.
- College-Level Education Opportunities.
- Dropout Prevention.

C. ALLOWABLE USES

In each program area, there are allowable uses to spend HSS funding.

Career and Technical Education: Establish or expand approved Career Technical Education (CTE) Programs of Study in high schools that are relevant to the job market in the district's community or region. Recipients must work with their CTE Regional Coordinator to develop a CTE Program of Study or Start-Up Program.[161]

This includes, but is not limited to:

- Purchasing equipment,
- Supporting student leadership organizations,
- Constructing facilities, and
- Recruiting, licensing, employing, and training of CTE staff.

College-Level Educational Opportunities: Establish or expand college-level educational opportunities for students in high schools.

This includes three areas:

1. College-level coursework -
   a. Advanced Placement, International Baccalaureate, or comparable college-level courses; or
   b. Dual credit and other accelerated college credit programs offered in conjunction with an Oregon community college, public university or other accredited institutions of high learning or post-high school career schools;
2. Assisting students with the selection and successful completion of college-level educational opportunities; and
3. The recruitment, licensing, employment, and training of personnel to provide college-level educational opportunities for students in high schools.

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161   In order to use HSS funds on CTE programs, they must be approved as either start up or full CTE Programs of Study meeting all state/federal requirements. For more information see p.64 of the CTE Policy Guidebook

Dropout Prevention: Establish or expand dropout prevention strategies in all high schools. This requirement to implement dropout prevention strategies in every high school is distinct from the other program areas.

This must include:

1. Implementing activities to reduce chronic absenteeism;
2. Establishing and maintaining data management systems that provide timely reports on students' grades, absences, and discipline by school and by course;
3. Beginning with grade 8, using attendance, course grades, credits earned and disciplinary referrals to identify students at risk of not graduating;
4. Beginning in the summer after grade 8, providing academic and social supports for students at risk of not graduating to ensure that the students are on-track to graduate by the time the students enter grade 10 and stay on-track to graduate after entering grade 10, including such supports as:

   a. Summer programs;

   b. Additional instructional time before and after school hours;

   c. Tutoring or small-group instruction during the school day; or

   d. Counseling services.

5. Providing counseling and coaching to expose students to employment opportunities and requirements and options for post-secondary education.

D. SUPPLEMENT, NOT SUPPLANT:

HSS funds must be used to establish or expand programs, and may not be used to maintain programs, opportunities, or strategies established prior to December 8, 2016. There is an exception: High School Success funds may be used to replace the loss or expiration of time-limited grants or federal funds.

E. SPENDING PERCENTAGES:

Every recipient–regardless of funding level–has the option to use funding to support all three program areas. Recipients that receive lower levels of funding have some flexibility to spend in fewer program areas, if they choose. This requirement is based on the funding the recipient receives in the first year of the biennium.

Funding Level during the first year of the biennium	Programmatic Area
Less than $100,000	Up to all three, but at least one
More than $100,000 but less than $350,000	Up to all three, but must address CTE and one of the other two
More than $350,000	Must address all three

F. ADMINISTRATIVE COSTS:

A grant recipient may use funds for administrative costs, both direct and indirect related to the HSS funds. Recipients may use up to 4% of funds for administrative costs biannually. If recipients use administrative costs, they must conduct an annual analysis of:

- Student attendance in grades 9 through 12; and
- Disciplinary referrals, suspensions and expulsions in grades 9 through 12 disaggregated by race and ethnicity.

G. PROGRAM SPECIFIC:

a. **FUNDING STUDENTS IN EIGHTH GRADE:** Recipients may use up to 15% of their HSS funds (after deducting allowable administrative costs) to support programs, opportunities, and strategies for students in eighth grade. All other spending must be for students in grades 9-12.

b. **ELIGIBILITY REQUIREMENTS:** Review Eligibility Rubric 2.0 for more details

   i. Provide sufficient time for teachers and staff of students in grade 9 to review data on students' grades, absences, and discipline by school and by course and to develop strategies to ensure at-risk students stay on-track to graduate.

   ii. Implement district-wide evidence-based practices for reducing chronic absenteeism in grades 9 through 12.

   iii. Assign and provide equitable access to high school students to advanced and dual-credit courses based on academic qualifications in order to avoid bias in course assignments.

   iv. Implement systems to ensure that high school students, including English Language Learners, are taking courses required for on-time graduation.

▶ STUDENT INVESTMENT ACCOUNT (SIA)

A. WHO IS ELIGIBLE

- School districts, public charter schools, YCEP and JDEP programs.
- Virtual charter schools are not eligible for SIA funds.

B. PROGRAM AREAS

There are five allowable use areas:

- Increasing Instructional Time.
- Addressing Student Health and Safety.
- Reducing Class Size.
- Expanding Availability of and Student Participation in Well-rounded Learning Experiences.
- Ongoing Community Engagement.

Within the allowable use areas, the law provides significant flexibility, but a district must demonstrate how a proposed expenditure:

1. Meets the specific goals of the Student Success Act;
2. Is incorporated into one of the allowable use areas;
3. Contributes to meeting the required Longitudinal Performance Growth Targets; and
4. Is informed by community engagement including focal student groups and families, needs assessment, and equity lens.

C. ALLOWABLE USES

Grantees can spend funding in one or more of the following categories:

1. Increasing instructional time, which may include activities such as:
   a. More hours or days of instructional time;
   b. Summer programs;
   c. Before-school or after-school programs; or
   d. Technological investments that minimize class time used for assessments administered to students.
2. Addressing students' health or safety needs, which may include:
   a. Social-emotional learning and development;
   b. Student mental and behavioral health;
   c. Improvements to teaching and learning practices or organizational structures that lead to better interpersonal relationships at the school;
   d. Student health and wellness;
   e. Trauma-informed practices;
   f. School health professionals and assistants; or
   g. Facility improvements directly related to improving student health or safety.
3. Reducing class sizes , which may include increasing the use of instructional assistants, by using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads.

4. Expanding availability of and student participation in well-rounded learning experiences, which may include:

    a. Developmentally appropriate and culturally responsive early literacy practices and programs in pre-kindergarten through third grade;

    b. Culturally responsive practices and programs in grades six through eight, including learning, counseling and student support that is connected to colleges and careers;

    c. Broadened curricular options at all grade levels, including access to: art, music, physical education, science, technology, engineering, mathematics, CTE, electives, accelerated college credit programs, dual credit programs, International Baccalaureate programs, advance placement programs, dropout prevention programs, transition programs (including Kindergarten transition programs), life skills classes, or talented and gifted programs; and

    d. Access to licensed educators with a library media endorsement.

5. Ongoing community engagement.

D. SUPPLEMENT, NOT SUPPLANT:

SIA does not have a supplement, not supplant provision.

E. SPENDING PERCENTAGES:

SIA does not have requirements around spending percentages.

F. ADMINISTRATIVE COSTS:

A grant recipient may use funds for administrative costs, including indirect costs, directly related to allowed expenditures as provided in the grant agreement. Administrative costs for SIA Funds are limited to 5% of the total expenditures, or $500,000, whichever is less regardless of rates for other funding streams annually. Any administrative costs incurred by participating charter schools must be accounted for within the sponsoring school district's overall limit of 5 percent or $500,000, whichever is less.

G. PROGRAM SPECIFIC:

a. **BUILDING, EXPANDING, OR MODIFYING FACILITIES:** Facility improvement directly related to improving student health or safety are allowable. However, beyond that, whether SIA funds can be used to build or expand facilities hinges on several variables. In order to be considered an allowable use of SIA funds, the SIA application would need to:

    i.   Identify how building, expanding, or modifying facilities meets the intent of the SIA,

    ii. Describe community engagement and input that elevates the need to build or expand facilities,

    iii. Articulate how an equity lens was applied in choosing this strategy to address equity-based disparities of student outcomes, and

    iv. Provide the context to show there is a true lack of space to execute the strategy and that building or expanding facilities is necessary to implement the strategy.

b. **PRESCHOOL:** The use of SIA funds to expand preschool / pre-kindergarten programs is not allowable. However, the use of SIA funds for Kindergarten Transition programs is allowable based on this memo with more guidance. ODE staff reviewers will rest their assessment on a district's ability to address these variables in their SIA application.

c. **UNIVERSAL CLASS SIZE REDUCTION:** Universal class size reductions are not allowable under the SIA. Class size reductions must be targeted or focused by using evidence-based criteria to ensure appropriate student-teacher ratios or staff caseloads. For example, reducing K-3 classes would be allowable whereas reducing K-12 classes would not be allowable with SIA funds.

▶ EARLY INDICATOR AND INTERVENTION SYSTEMS (EIIS)

A. WHO IS ELIGIBLE

- Funding is available to school districts, public charter schools, and virtual charter schools.
- YCEP and JDEP programs are not eligible for EIIS funds.

B. PROGRAM AREAS

Grant funding is provided to support implementation of cohesive EIIS systems that include these elements:

- Active staff teams at school and district level.
- Robust framework of supports and interventions.
- Program innovation and improvement.
- Student, family, and community engagement.
- System for indicator data collection and analysis such as predictive analytics to identify supports for students and areas for improvement.
- Integrated elements, connections across grade levels and schools, and alignment with other ODE initiatives–including the Student Investment Account, Continuous Improvement Plan, High School Success, or Every Day Matters–to identify areas of improvement and support students.

C. ALLOWABLE USES

EIIS grant funding is allowed to be spent in the following six areas. Recipients may choose to use funds in one, several, or all areas.

1. System software purchases and subscriptions

    a. Software that provides reliable, easily accessible data that identifies student progress toward graduation in multiple dimensions, including student attendance, engagement in learning, and learning outcomes (grades, standardized test scores), as well as additional indicators and influencers of student success, including student empathy interviews, social-emotional well-being surveys, health and mental health supports, and opportunity for enrichment activities.

2. Staffing to maintain the system and facilitate corrective action

    b. District or school staff who lead overall EIIS, manage the data system, make data available to the data team, lead the data team, provide direct support to students and families, and/or lead partnerships with community organizations related to activity of the EIIS.

3. Training for staff to maintain and use the system with fidelity

    c. Related to staff learning and the development of equity-centered data analysis skills, increasing capacity for the data team or professional learning community, student-centered learning supports, increasing partnerships with families and students, developing culturally supportive and sustaining instructional strategies, or increasing the understanding of students, their families, and cultures.

4. Data analysis and research

    a. Staff or other costs related to equity-centered analysis of a district or school's local student learning and participation data, including non-traditional and locally collected data.

    b. Activities and processes that assist the district or school to analyze data from the EIIS implementation in order to apply.

5. Tribal government consultation

   a. Related to developing strong relationships with local tribal governments and communities.

6. Student, family, staff, and community engagement

   a. Initiatives and programs that authentically engage students and families in aspects of the EIIS.

   b. Activities and events that build capacity for students, families, and the community to participate in EIIS, such as parent learning events about navigating the school system

C. SUPPLEMENT, NOT SUPPLANT:

EIIS does not have a supplement, not supplant provision.

D. SPENDING PERCENTAGES:

EIIS does not have requirements around spending percentages.

E. ADMINISTRATIVE COSTS:

Districts cannot claim administrative cost or indirect cost related to the EIIS funds.

F. PROGRAM SPECIFIC:

   a. **TECHNICAL ASSISTANCE/PROFESSIONAL LEARNING:** Required to participate in technical assistance or professional learning offered by ODE during the biennium.

▶ EARLY LITERACY SUCCESS SCHOOL DISTRICT GRANT (ELSSDG)

A. WHO IS ELIGIBLE

- School districts and public charter schools serving pre-kindergarten through 3rd grade.
- Virtual charter schools are not eligible for Early Literacy Success School District Grants.

B. PROGRAM AREAS

- Increase early literacy for children from birth to third grade;
- Reduce literacy academic disparities for student groups that have historically experienced academic disparities;
- Increase support to parents and guardians to enable them to be partners in the development of their children's literacy skills and knowledge;
- Increase access to early literacy learning through support that is research-aligned, culturally responsive, student-centered and family-centered.

C. ALLOWABLE USES

The ELSSDG allows funding of the following research-aligned activities[162]:

- High-Dosage Tutoring
- Extended-Learning
- Professional Development
- Coaching
- Adoption and Implementation of Curriculum
  - Funds from this grant used for the adoption and implementation of kindergarten through grade three core instructional materials may only be used for materials from the State Board of Education adopted list for ELA.
  - Funds from this grant used for the adoption and implementation of pre-kindergarten core instructional materials may only be used for materials that meet criteria[163] established by the Department of Early Learning and Care.

D. SUPPLEMENT, NOT SUPPLANT:

ELSSDG does not have a supplement, not supplant provision.

E. SPENDING PERCENTAGES:

Applicants with more than one elementary school must prioritize the distribution of Early Literacy funding and resources to a school or schools based on the school(s) meeting one or more of the following characteristics:

(a) have the lowest rates of proficiency in literacy of elementary schools in the district;

(b) identified for comprehensive support and improvement or for targeted support and improvement under the federal Every Student Succeeds Act (P.L. 114-95, 129 Stat. 1802) based in part on literacy score;

(c) have literacy proficiency rates that have not recovered to pre-pandemic levels; or

(d) have a higher portion of student groups that have historically experienced academic disparities compared to other elementary schools in the district.

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162   Further information regarding requirements and criteria will be released in January 2025.
163   To be established by January 1, 2025.

Rates of proficiency must be determined using multiple sources of data which must include state Language Arts summative assessment data and, for eligible applicants who serve English Language Learners, English Language Proficiency Assessment data and may include interim, benchmark, Language Arts proficiency and other early literacy assessments of student proficiency in literacy in any language.

Applicants will need to select one or more of the characteristics they used for prioritization in the Early Literacy Smartsheet link and an approximate planned distribution across schools receiving Early Literacy funds.

F. ADMINISTRATIVE COSTS:

A grant recipient may use funds for administrative costs, both direct and indirect related to the ELSSDG funds. Administrative costs are limited to 5% of the total expenditures biannually.

G. PROGRAM SPECIFIC:

- **ALLOWABLE GRADE LEVELS:** The grant funds must be used to support early elementary grades, which are defined as any grade from pre-kindergarten through 3rd grade. Applicants may focus on one grade level; however, applying and reporting requires information to be provided for kindergarten-3rd grade and pre-kindergarten.
  - For 2025-2027, spending for 4th and 5th grade is no longer an allowable use of funds, per statute.

- **OREGON'S EARLY LITERACY FRAMEWORK:** This framework is key to early literacy implementation and includes eight components that should be considered: Student Belonging; Family & Community Partnerships; Oral Language as the Root of LIteracy Development; Reading Models Based in Research; Foundational Skills; Writing, Reading Comprehension, Vocabulary, & Background Knowledge; Core Instruction & Assessment; and Reaching All Learners.

- **PROGRAM REVIEW TOOL:** The Program Review Tool is a requirement for this program. It works in conjunction with Oregon's Early Literacy Framework and is a part of the Needs Assessment process.

▶ PERKINS V – CTE[164]

A. WHO IS ELIGIBLE

- School districts, public charter schools and virtual charter schools (through a sponsoring district or consortium), YCEP and JDEP Programs, the Oregon School for the Deaf, community colleges, an area CTE school, ESDs, regional consortia, and Tribal Educational Agency.
- Eligible recipients must have at least one CTE Program of Study approved by the state.

B. PROGRAM AREAS

The purpose of Perkins funds is to develop more fully the academic knowledge, technical skills, and employability of secondary and postsecondary students who elect to enroll in CTE Programs of Study. CTE Programs of Study are offered in grades 9-12 and community college pre-baccalaureate programs. Perkins funds are primarily used to support CTE Programs of Study, but can also be used for career exploration and guidance down to middle school and transitions into postsecondary training.

C. ALLOWABLE USES

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.
- 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.
- For more specific information about allowable costs , please refer to the CTE Policy Guidebook - Section 14.9.

D. SUPPLEMENT, NOT SUPPLANT:

Perkins V Sec 211(a) Funds made available for CTE activities shall supplement, and shall not supplant, non-federal funds expended to carry out career and technical education services.

E. SPENDING PERCENTAGES

There are no spending percentage requirements as in other programs. However, only 20% of the grant award amount will be available between July 1 and October 1 each year. The remaining 80% will be made available after final award announcements are made from the US Department of Education.

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164 Information below applies to both direct Perkins V-CTE Direct Recipients and CTE consortium recipients. For integrated programs application purposes, the review team will only be reviewing the Perkins V-CTE Direct Recipients.

F. ADMINISTRATION COSTS:

A grant recipient may use funds for administrative costs, both direct and indirect related to the Perkins V - CTE funds. Regardless of negotiated indirect rate, the total direct and indirect administrative costs cannot exceed 5% of the grant award.

G. PROGRAM SPECIFIC:

For more detailed information on Perkins V - CTE please reference the Supporting CTE Perkins Direct Recipients appendix.

▶ FEDERAL SCHOOL IMPROVEMENT (CSI/TSI)

A. WHO IS ELIGIBLE

Federal School Improvement funds are provided to districts with a significant number or proportion of schools identified as Comprehensive Support and Improvement (CSI) or Targeted Support and Improvement (TSI) schools.

B. PROGRAM AREAS

The funds are intended to support improved outcomes for focal students in the following areas:

- Advancing Equity
- Promoting a Well-Rounded Education
- Strengthening District Systems
- Fostering Ongoing Engagement

C. ALLOWABLE USES

Federal School Improvement funds are Title I-A funds and must be spent in accordance with Title I-A rules. These rules allow funding to support a wide range of activities to help Title I-A students meet state academic standards (taken from the OR Federal Funds Guide). This includes, but is not limited to:

- Providing eligible students with a well-rounded education.
- Instructional supports.
- Non-instructional supports like behavior and mentoring supports, and social and emotional learning.
- Improving school quality.

These funds must adhere to the evidence-based provisions of the Every Student Succeeds Act. Refer to the Leveraging Evidence-Based Practices for Local School Improvement document for additional information.

Activities must be aligned in service to the focal student groups identified as needing additional focus and support.

D. SUPPLEMENT, NOT SUPPLANT:

Districts must assure that each school the district serves with these funds will receive all of the State and local funds it would have received in the absence of the Federal School Improvement funds.

E. SPENDING PERCENTAGES:

Federal School Improvement funds do not have spending percentages.

F. ADMINISTRATIVE COSTS:

Federal School Improvement funds are a subset of Title 1-A funds, therefore indirect costs have already been applied to Title 1-A funds and may not be applied to FSI funds. However, reasonable and necessary direct administrative costs, not to exceed 5% of the total allocation, are allowed. Additional information is provided in the ESSA Quick Reference Brief: Administrative Costs.

G. PROGRAM SPECIFIC:

Allocations are based on the number and/or percentage of total identified schools within a district; not all districts with identified CSI or TSI schools will receive Federal School Improvement Funds.