

APPENDIX I: PLAN EVALUATION CRITERIA

Application Evaluation Criteria	
Intake Checklist	
Required Attachments	Yes/No
1. Equity lens or tool used to inform planning and decision-making	
2. Five community engagement artifacts (or two if a small/rural district or YCEP/JDEP)	
3. Presentation and Approval of Plan Board meeting minutes	
4. District Charter Program Agreements (if applicable)	
5. MOU detailing aligned program consortia agreements (if applicable)	
6. Assurance of compliance with state/federal laws is complete	
7. Assurance of review of Student Success Plans	
8. Assurance of consideration of the Quality Education Model (QEM)	
9. Assurance that disaggregated data by focal group was examined during the planning process	
10. Assurance of multiple data sources used for the prioritization of Early Literacy Funds	
11. Documentation of Tribal Consultation (if applicable)-- Including the Tribal Consultation Worksheet and Affirmation for Tribal Consultation	
12. For Direct Perkins Recipients Only: Perkins Improvement Plan (if applicable)	
Completion Check	Meets/Does Not Meet
1. Are all questions on the application answered?	
2. Have all assurances been verified?	

Application Evaluation Criteria

Reviewer Template	
1. Quality Check	Meets/Does Not Meet
1.1 There is a summary of the needs assessment process. Recipients with a CTE Program of Study include how CTE was incorporated in the process and those with a charter(s) provide information about the charter's needs assessment process.	
1.2 There is a description of the plan and it addresses strengths and weaknesses.	
1.3 An equity lens or tool was used to inform planning and decision-making	
1.4 URL of posted grant application, including the budget, is a working link on grantee website and is publicly available	
1.5 All questions have a response. As applicable, responses that have been pre-populated have been reviewed and checked for accuracy and/or updated.	
1.6 At least one outcome about early literacy has been included.	
1.7 Board meeting minutes (draft minutes are allowed) demonstrate plan approval available for public comment (non-consent agenda item).	
1.8 (Districts with charters only) There is evidence of how charters participated in the planning and development of the plan.	
1.9 Two pieces of documentation of Tribal Consultation relates to the integrated plan and contains signatures from tribal government representatives and school district representatives (Tribal Consultation Worksheet and Affirmation for Tribal Consultation (if applicable))	
2. Equity Advanced For All Applicants	Meets/Does Not Meet
2.1 Specific focal groups are identified and supports are named.	
2.2 Training or professional development for staff to support students is named.	
2.3 Information about how students learn and have access to various opportunities within the K-12 system is shared.	
3. Well-Rounded Education For All Applicants	Meets/Does Not Meet
3.1 The early literacy program review shares any changes and/or improvements.	
3.2 The plan supports mental and behavioral health.	
3.3 Experiences around Career Connected Learning, Work-Based Learning, CTE for students are explained for the K-12 system.	
4. Engaged Community and Evidence of Engagement For All Applicants	Meets/Does Not Meet
4.1 Application offers reflections on community engagement improvements and learning.	
4.2 Indication that focal student groups and families of focal student groups were engaged to the extent possible, including but not limited to those groups in the disaggregated data.	

Application Evaluation Criteria

Reviewer Template

<p>4.3 Perkins Direct applicants have indicated the inclusion of the following groups in engagement activities:</p> <ul style="list-style-type: none"> ▪ Students of color and families of students of color ▪ Students with disabilities and families of students with disabilities ▪ Students and families who are navigating poverty, houselessness, and foster care ▪ Students who are parenting or pregnant ▪ Students and families experiencing active duty military service (if applicable) ▪ Licensed staff (administrators, teachers, CTE teachers, counselors, etc.) ▪ Classified staff (paraprofessionals, bus drivers, office support, etc.) ▪ Local or regional business and/or industry community ▪ Local Community College CTE Deans and/or Instructors ▪ Local or Regional Workforce Development Board ▪ CTE Regional Coordinators 	
<p>4.4 Two engagement strategies were used with focal students and their families around the integrated planning process.</p>	
<p>4.5 Two engagement strategies were used with classified and certified staff around the integrated planning process.</p>	
<p>4.6 Five artifacts (two if under 80ADMr) demonstrate evidence of engagement around the integrated application. For those with five artifacts: one artifact must represent focal group engagement and one must represent classified or certified engagement. The other three can represent focal group, staff, or community engagement.</p> <p>For those districts with 80ADMr or less <i>or</i> YCEP/JDEPs, artifacts demonstrating engagement with focal groups, staff, or community around integrated application have been submitted.</p> <p>For districts with charters, an additional artifact for each charter has been included (outside of the five required) for each additional IPBT where the outcomes and strategies are not the same.</p>	
<p>4.6 A holistic summary of learning from staff and community is explained.</p>	
<p>5. Strengthened Systems and Capacity For All Applicants</p>	<p>Meets/Does Not Meet</p>
<p>5.1 Describes the transition system between LTCT, YCEP, JDEP and the district.</p>	
<p>5.2 Strategies for effective transition support for students and families are described (Early childhood education to elementary, elementary to middle grades, middle to high school grades, and high school to postsecondary education/workforce).</p>	
<p>5.3 Career and development coursework activities are listed and methods for partnership with families, including guidance/counseling, are explained.</p>	
<p>6. Early Literacy Smartsheets: Inventory & Curriculum Review and Allowable Use Descriptions</p>	<p>Meets/Does Not Meet</p>
<p>6.1 Application includes a core (or basal) ELA curriculum for grades K-3 identified in the Inventory. If applicable, inventory includes curriculum for pre-kindergarten.</p>	
<p>6.2 For districts, only: The adoption date of the core curriculum is on or after February 2020. If no, there is a description explaining anticipated changes and anticipated date of new adoption</p>	
<p>6.3 For charters, only: A review or evaluation process of the core curriculum using the state criteria adopted in 2020 is indicated in the Inventory. If no, description is provided explaining when and how a review using the criteria will occur or intent to use curriculum from the SBE list.</p>	

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Reviewer Template

6.4 For any material types other than core/basal curriculum, all applicable information is complete (Title, Vendor, Type, Grades, Date of Adoption, Print or Digital).	
6.5 A student growth assessment for literacy is submitted in the Inventory. Note: The “disaggregation of data” requirement for this application requirement is evaluated through an assurance.	
6.6 All information has been completed for professional development, coaching, high-dosage tutoring, and extended-learning in the Early Literacy Allowable Use Smartsheet link.	
6.7 If there are any changes to the Inventory, all tabs and information is complete.	
7. Budget For All Applicants	Meets/Does Not Meet
7.1 Needs identified and included in the application related to equity and access inform the outcomes and strategies listed on the planning tab.	
7.2 Each activity in the budget connects, in some way, to a strategy on the planning tab.	
7.3 The budget aligns with allocation estimates for each funding stream.	

Application Evaluation Criteria

Budget Review

1. Application Review Criteria	Meets/Does Not Meet
1.1 There is a reasonable tie between the narrative plan and process requirements in the application to what is submitted in the budget	
1.2 Assurance of expenditures of supplement (not supplant) for FSI, CTE, and HSS district/school activities is checked	
1.3 Assurance that HSS funded dropout prevention/pushout prevention activities are applied at all high school sites within the district	
2. Integrated Planning and Budget	Meets/Does Not Meet
2.1 The Smartsheets with planning and two years of budgeting are complete	
2.2 There is an emphasis on equity and access that inform the outcomes and strategies.	
2.3 The possible programs indicated as funding each strategy on the planning Smartsheet are allowable uses of funds (refer to the Program-by-Program Details Appendix)	
2.4 Each budget aligns with allocation estimates (within 10% of allocation)	
2.5 Each activity in both years of the budget: <ul style="list-style-type: none"> ▪ Connects to a strategy ▪ Specifies: <ul style="list-style-type: none"> ▪ Optional partnership (if applicable) ▪ FTE & FTE Type (if applicable) ▪ Appropriate allowable use codes that align with each funding source utilized ▪ Object Code ▪ Uses allowable funding sources at the activity level ▪ Identifies fully administered charter line items (if applicable) 	

Application Evaluation Criteria

Budget Review	
2.6 Administrative costs in both years of the budget falls within allowability <ul style="list-style-type: none"> ▪ HSS- 4% ▪ SIA- 5% of expenditures or \$500,000 (whichever is less) ▪ Early Lit- 5% ▪ CTE- 5% 	
2.7 Additional & Tiered Planning: If completed, all activities fulfill the requirements outlined in question 2.5 above	
3. For all HSS Activities	Meets/Does Not Meet
3.1 The HSS portion of the budget meets the required amount of programmatic areas according to the HSS allocation amount in both years: <ul style="list-style-type: none"> ▪ Under \$100,000- one programmatic area ▪ Between \$100,001 and \$350,000- two programmatic areas, including CTE ▪ Over \$350,000- three programmatic areas 	
3.2 Activities funded out of HSS are for grades 8-12	
3.3 8th grade spending is 15% or less	
3.4 College Level Opportunities activities are connected to students earning college credit while in high school	
3.5 Dropout Prevention activities are connected to reducing chronic absenteeism, establishing/maintaining data systems, identifying students at risk of not graduating, academic and social supports, counseling and coaching related to college and career	
For Activities mentioning CTE, but not funded through Perkins	
3.6 CTE spending aligns to an official CTE Program of Study.	
4. For all SIA Activities	Meets/Does Not Meet
4.1 Activities address student mental and behavioral needs, increased academic achievement, and reduced academic disparities (WRE, RCS, IIT, H&S, OCG)	
4.2 Early Learning activities name Kindergarten Transition (If Applicable)	
4.3 Class size reduction activities do not universally reduce class size (If Applicable)	
4.4 Capital improvement activities clearly align with a strategy on the planning tab (If Applicable)	
5. For Early Literacy Activities	Meets/Does Not Meet
5.1 Any proposed changes indicated in the Inventory are reflected in the budget, if funded by Early Literacy.	
5.2 There is planned funding in all three areas of Early Literacy: <ul style="list-style-type: none"> ▪ Professional Development and Coaching; ▪ Extended Learning Programs; ▪ High Dosage Tutoring 	
5.3 Investments are limited to Pre-K through grade 3.	
5.4 All information has been completed for professional development, coaching, high-dosage tutoring, and extended-learning in the Early Literacy Allowable Use Smartsheet link.	

Application Evaluation Criteria

Budget Review	
5.5 Any external high-dosage tutoring or professional development/coaching, uses vendors from the approved list.	
6. For all CTE Perkins Funded Activities (For Direct Recipients Only)	Meets/Does Not Meet
6.1 Investments are limited to grades 9-12 grades, non-supplanting and specific approved CTE Programs of Study.	
6.2 All CTE activities invest a minimum of 15% in Professional Development	
6.3- All CTE leadership staffing activities do not exceed 30% of the allocation	
6.4 Of the CTE Investments, there is no instructor/teacher-related FTE	
7. 7. For all FSI Activities	Meets/Does Not Meet
7.1 School and/or district level strategies and activities are tied to the aims of federal school improvement (Program by Program Details Appendix as reference)	
7.2 Activities that support FSI name the FSI school(s) identified in their activity description	
1. District Charter Program Agreements	Meets/Does Not Meet
1.1 The DCPA spans the 23-2025 biennium and contains the following sections: <ul style="list-style-type: none"> ▪ Exchange of services; ▪ Distribution of funds; ▪ Administrative costs; ▪ Allowable uses; ▪ Accountability; ▪ Reporting progress; and ▪ Additional components to consider. 	
1.2 Admin cost percentages and pass through amounts are specified for SIA, except for fully administered charters	
1.3 If Applicable: If a district will pass through any amount that differs from the ODE SIA Allocation, the amount is specified in the DCPA	
1.4 If the charter is fully administered: <ul style="list-style-type: none"> ▪ District names the retention of all SIA funds generated by the charter's ADMw (usually found in Distribution of Funds) ▪ District describes the services offered to the charter (usually found in Exchange of Services) 	
1.5 The DCPA is signed by both parties	
1. Aligned Program Consortia Memorandum of Understanding	Meets/Does Not Meet
1.1 MOU designates a lead and fiscal agency	
1.2 MOU defines consortium operations and the reporting structure	
1.3 MOU demonstrates agreement with what is outlined in the plan and budget.	
1.4 MOU outlines the implementation of the High School Success eligibility requirements (if applicable) and all parties agree to be held accountable as one entity	
1.5 MOU is signed by all members of the consortium	