*This checklist is aligned with the criteria that ODE program specialists use when reviewing budget narratives. It is offered as an optional tool for districts to use in reviewing their Title II-A narrative prior to submission.*

# Needs Assessment\*

[ ]  Are the sources of data that were reviewed listed?

[ ]  Are inequities in student outcomes described?

[ ]  Are identified priorities named or numbered?

[ ]  Is a description included of how stakeholders, including parents, teachers and other relevant school personnel, were involved in the needs assessment and planning process?

*\*The content of this section can reflect the district’s larger needs assessment process and results. Districts are not required to engage in a separate needs assessment for Title II-A.*

Equitable Services Worksheet *(Only applies to districts with participating private schools)*

[ ]  Is the LEA contact information complete?

[ ]  Is the total claimed for indirect costs **equal to or less than** the amount listed at the bottom of the Budget Narrative Page?

[ ]  Does the total for Equitable Services on the worksheet match the total of the 3300 Function Code column on the Spending Page?

# Budget Narrative Page

Does each line item include:

[ ]  A named or numbered prioritized need? (WHY)

[ ]  A description of the knowledge and skills participants will receive? (WHAT)

[ ]  The number of teachers, paraprofessionals, principals and other schools leaders[[1]](#footnote-1) participating? (WHO)

[ ]  A description of how the impact of the strategy will be measured? (HOW)

[ ]  How the strategy meets the USED definition of PD as “high-quality, sustained and intensive”? (e.g. what is the frequency; if it is a conference how it is part of a larger plan for professional learning)

[ ]  Are costs [allowable](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Documents/ESSA%20Oregon%20Guide.docx) (necessary, reasonable and allocable)? (pp. 69-74 of Oregon Federal Funds Guide)

[ ]  If paying for a position, are the roles/responsibilities and amount of FTE included?

[ ]  Does the narrative description match the object codes selected?

**IF Class Size Reduction is included as a strategy**, does it meet the following criteria:

[ ]  Only grades K-3?

[ ]  Reduces class size to 20 or fewer **in every class at the targeted grade level within the school?**

[ ]  Assurance that the teacher hired to reduce class size is appropriately licensed by the state?

**IF the district has participating private schools,** is there a separate line item that includes:

[ ]  The names of the participating schools?

[ ]  The date of initial consultation?

[ ]  A description of private school activities or statement that the district is aware of each school’s plan?

[ ]  A total for the line item using Object Code 3300 that matches the amount on the Equitable Services Worksheet?

# Resources

* [Title II-A Supporting Effective Instruction](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/IIA/Pages/default.aspx)
* [Oregon Federal Funds Guide](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Documents/ESSA%20Oregon%20Guide.docx)
* [Title II-A Basics](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Pages/FederalProgramLearning.aspx) (PPT)
* [Title II-A Budget Narrative Instructions](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/IIA/Documents/T2AApplicationInstructions.docx)

# Contacts

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1. *USED defines “other school leaders “as employees or officers of an elementary or secondary school, LEA, or other entity operating a school who are responsible for the daily instructional leadership and managerial operations in the elementary school or secondary school building.” [ESEA section 8101(44)].* [↑](#footnote-ref-1)