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

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 on the Spending Page?

# Needs Assessment\*

Have needs/priorities been identified for students, schools, and/or educators?

Are program objectives listed?

# Spending

Is the total for Safe and Healthy Schools **at least 20%** of the total allocation? \*

Is the total for Well-Rounded Education **each** **at least 20%** of the total allocation? \*

Is the total for Technology Infrastructure **no larger than 15%** of the total allocation?

# Budget Narrative

Does each line item include:

An identified need/priority\* (WHY did you choose this strategy?)

A description of the activity (WHAT is the objective)?

A description of WHO will be participating?

The measure used to determine the impact of the strategy (HOW will you know the strategy is generating the results you expect)?

Function codes for each Title IV-A “bucket” it relates to (SHS, WRE, TECH)?

An indication of how the activity is supplemental?

Are all activities [allowable](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Documents/SSAE%20Guidance.docx), reasonable and necessary? (pp. 37-43 of Oregon Federal Funds Guide)

For any FTE are job duties/responsibilities described?

Is it clear how these positions are supplemental?

**IF the district has participating private schools**, does the narrative include a line item with:

Names of participating private schools?

Confirmation that the district has received a plan from each private school and knows what they are going to do?

Are administrative costs limited to 2% or less?

*\*Only required for awards over $30,000*

# Resources

* [Title IV-A Student Support and Academic Achievement](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Pages/SSAE.aspx)
* [Oregon Federal Funds Guide](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Documents/ESSA%20Oregon%20Guide.docx)
* [Title IV-A Basics](https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/Pages/FederalProgramResources.aspx) (PPT)

# Contacts

* Jen Engberg [jennifer.engberg@ode.oregon.gov](mailto:jennifer.engberg@ode.oregon.gov)
* Sarah Martin [sarah.martin@ode.oregon.gov](mailto:sarah.martin@ode.oregon.gov)
* Lisa Plumb [lisa.plumb@ode.oregon.gov](mailto:lisa.plumb@ode.oregon.gov)
* Amy Tidwell [amy.tidwell@ode.oregon.gov](mailto:amy.tidwell@ode.oregon.gov)