Hosts

Janel Alberts
Coordinator, OCDE Grants & Evaluation

Natalie Lohrenz
Coordinator, OCDE Grants & Funding

Rachel Domb
Project Manager, OCDE Grants & Funding

Emily Sorsher
Project Manager, OCDE Grants & Funding

Innovation Funding Initiative

Orange County Department of Education

Webinar Overview

❖ Initiative Overview

❖ Logistics

❖ Intent to Apply

❖ Application Components

❖ Submission Process

❖ Scoring

❖ Supports Available

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Webinar Housekeeping

- Please submit questions using the Question & Answer section of the webinar

- The slide deck will be available on the Innovation Funding Initiative website (Technical Assistance page) within 24 hours after the webinar concludes (ocde.us/innovationfunding)

- This same webinar will be held again next Wednesday, December 17, 2:00–3:00 p.m.

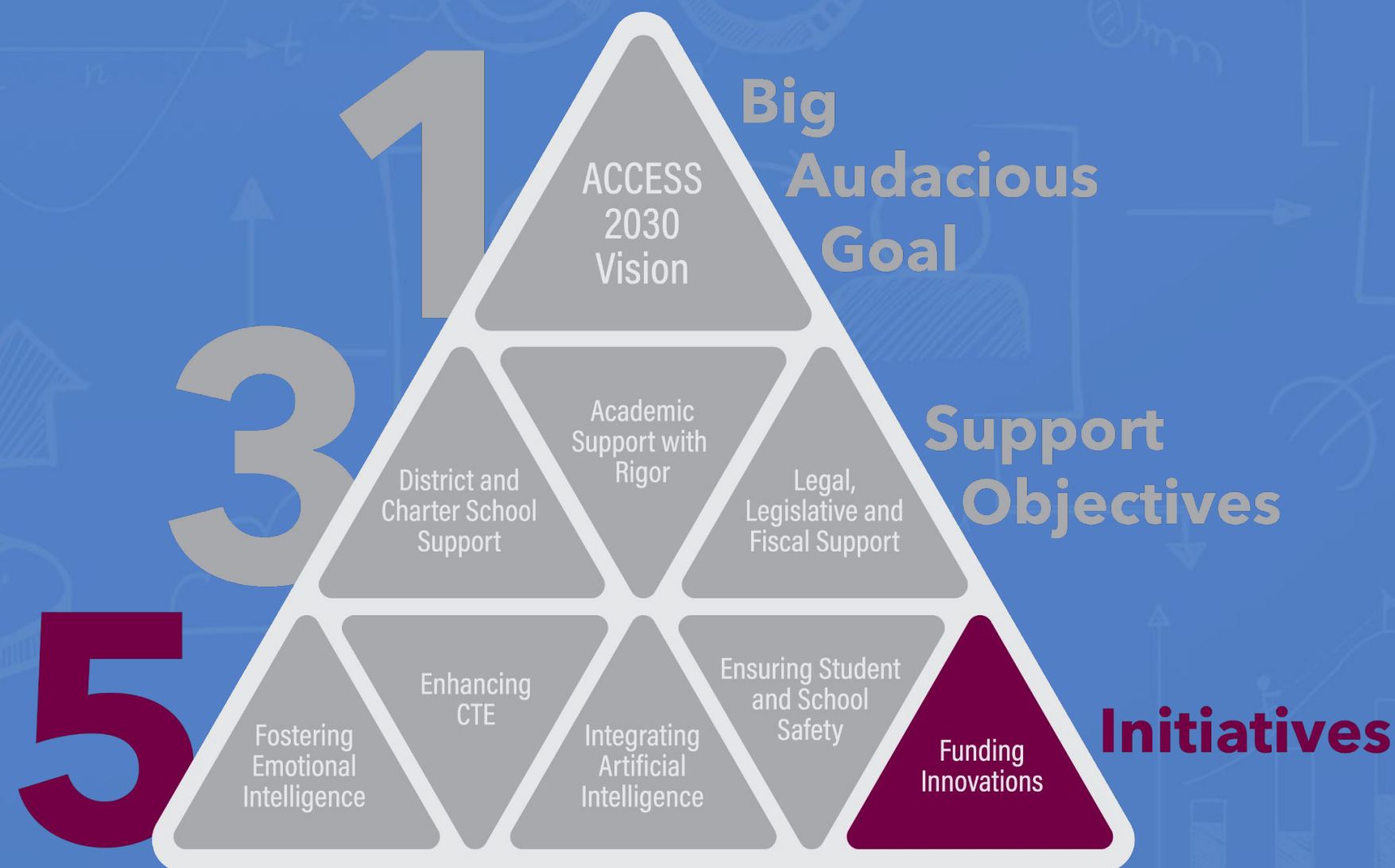**Innovation Funding Initiative**

Initiative Overview

Orange County Department of Education

Background

New funding opportunity to support innovative educational projects

Part of OCDE's 5-3-1 Strategic Plan

1 — ACCESS 2030 Vision — **Big Audacious Goal**

3 — Academic Support with Rigor, District and Charter School Support, Legal, Legislative and Fiscal Support — **Support Objectives**

5 — Fostering Emotional Intelligence, Enhancing CTE, Integrating Artificial Intelligence, Ensuring Student and School Safety, Funding Innovations — **Initiatives**

Program Purpose

- **Explore and expand innovative practices** that elevate student engagement and achievement, through projects that have **potential to be replicated and scaled**.

- **Empower schools and districts** with the resources needed to develop and implement **pioneering projects** to address challenges faced by Orange County's schools and students.

- **Build a collaborative network** of visionary educators dedicated to shaping a forward-thinking future in education.

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What is Innovation?

Implementation of a new strategy or novel application of strategies designed to address an unmet need in an educational context to improve efficiency or student outcomes.

Grounded in Theory or Evidence

Innovative approach must be based on data, evidence, and/or theory

Needs-Responsive

Directly addresses specific challenges faced by students or schools

Sustainable & Scalable

Capable of producing lasting change that can be replicated across contexts

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Logistics

RFA: See pages 4-5

Who is Eligible to Apply?

Lead Applicants

- Orange County school districts* as individual applicants
- Consortium of Orange County districts* with one designated lead applicant

*serving students in grades TK-12

Application Requirements

- Districts must apply with input from one or more school sites
- Districts may submit multiple applications but will receive no more than one award per cohort as lead applicant

Eligibility Restrictions

- School sites, LEAs outside of Orange County, charter schools, and other non-LEA entities are not eligible to apply.

All 28 Orange County districts are eligible to apply. OCDE ACCESS is not eligible to apply.

Awards Available

Number of Awards

5-6

Districts Selected

Maximum Award Amount

$525,000

for 3-year project period

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Timeline: Due Dates, Program Dates

Activity	Date
Release of Request for Applications (RFA)	December 3, 2025
Deadline to submit Intent to Apply (optional)	December 19, 2025, 5:00 p.m. (PST)
Webinars for Prospective Applicants: Innovation Funding RFA Overview	December 11, 2025, 10:30 a.m. (PST) December 17, 2025, 2:00 p.m. (PST)
Office Hours for Technical Questions Times to be announced in late December	January 6, 2026 January 12, 2026 January 20, 2026
Deadline to submit questions	January 20, 2026, 5:00 p.m. (PST)
Final responses to questions (Frequently Asked Questions/FAQs) posted on website	January 23, 2026
Deadline to submit applications (Late or partial submissions will not be accepted)	January 30, 2026, 5:00 p.m. (PST)
Anticipated award announcement	February 27, 2026
Period of Performance	July 1, 2026 - June 30, 2029

Intent to Apply

RFA: See pages 4 & 11

Orange County Department of Education

Intent to Apply Form

- Intent to Apply Form is <u>not</u> required

- Applications will be accepted even if Intent to Apply is not submitted

- Not bound by information provided on form

- Separate form for each project is encouraged

- Those submitting an Intent to Apply Form will receive direct updates

OCDE Innovation Funding Initiative: Intent to Apply Form - rev. 12.10.25

Stefan Bean, Ed.D.
County Superintendent of Schools

Submitting an intent to apply is not a requirement of this funding program. However, prospective applicants who submit an intent to apply will receive direct updates. Applications will be accepted from applicants who do not submit an intent to apply. Prospective applicants are further not bound by the project ideas shared on this intent form. A separate form may be submitted for each project the district is considering submitting for funding consideration.

Deadline to submit an intent form: December 19, 2025, 5:00 p.m. (PST)

Lead District Name		
Primary Contact Name	Primary Contact Email Address	Primary Contact Phone Number

☐ Check this box if you are considering submitting a Consortium application.

Project Focus Area
With which of the following focus areas does the project primarily align? (Select one)
☐ Career and Technical Education (CTE)
☐ Early learning
☐ Expanded learning
☐ Learning and literacy
☐ School climate and safety
☐ STEM (Science, Technology, Engineering, and Math; includes AI)
☐ Student enrichment programs
☐ Student health and wellness
☐ Student supports
☐ Youth development and leadership
☐ Other (specify): _____

Provide a brief (2-3 sentence) description of the idea the district is thinking of proposing.

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Application Components

RFA: See pages 8, 15-23

Sections of RFA

Table of Contents

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Application Requirements

- ❏ Application Checklist
- ❏ Applicant Information Form
- ❏ Applicant Agreement Form
- ❏ Project Narrative
- ❏ Budget Narrative
- ❏ Budget Workbook
- ❏ Appendix

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Application Checklist

Use this to confirm you have everything

Ensure documents adhere to required formatting, page limits, and include requested content.

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Application Checklist

Prior to submitting an application, use this checklist to ensure all required elements of the application are complete and adhere to the guidance provided in the Request for Applications (e.g., page limits, content, formatting). This checklist must be included with the application.

One Application PDF Containing:

- ☐ Completed Application Checklist
- ☐ Applicant Information Form, with Project Abstract (1 page maximum)
- ☐ Applicant Agreements Form, with Acknowledgement of Authorization
- ☐ Project Narrative, with responses to all specified sections (20 page maximum)
- ☐ Budget Narrative
- ☐ Appendix (10 page maximum), containing supplemental materials applicant believes will enhance their application, such as:
  - ☐ Letters of Support (optional)
  - ☐ A Metrics Table (required; may be in embedded within narrative or included in the Appendix)
  - ☐ A logic model, tables, or graphics supporting the narrative (optional)
  - ☐ Citations list (required)
  - ☐ Letters of Commitment (required, if Consortium application)
  - ☐ Description of Consortium Partner Roles (required if, Consortium application; 3 page maximum)

One Excel File Containing:

- ☐ Budget Workbook (using the required 3-year budget template)

Applicant Information Form

Applicant Information Form

1. Project Information

Project Title	Total Funding Amount Requested

2. Applicant Information

Single District Applicant or District Lead (if Consortium)

District Name	

Primary Project Leader

Name	
Title	
Phone Number	
Email Address	

- Project Information
- Applicant Information
- Project Abstract
- Project Focus Area

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Applicant Agreement Form

- Awardee Orientation

- Professional Learning Community

- Education Initiative Summit

- Coaching/Technical Assistance

- Evaluation, Data Collection, and Reporting

- Compliance with local, state, and federal laws and contracted activities

- RFA: Page 8

Innovation Funding Initiative

Applicant Agreement Form

Applicants must check all boxes in each section below, acknowledging their agreement to these conditions if chosen as an awardee under the OCDE Innovation Funding Initiative program.

General Agreements

Awardees agree to:

☐ Attend an Innovation Funding Initiative Orientation session (expected to be held within 2 months of contract award).

☐ Participate in an Innovation Funding professional learning community throughout the duration of the 3-year project period.

☐ Participate in the Orange County Education Innovation Summit (to be held after the first full implementation year).

☐ Comply with all local, state, and federal laws and educational code regulations in the use of innovation funding awarded under this program, and in the implementation of the innovation project, contracting activities, management of data or evidence generated by the project, and any other activities being implemented as part of this funding program.

Coaching/Technical Assistance Agreements

Awardees agree to:

☐ Meet, at a minimum quarterly, with an assigned OCDE Evaluator and Implementation Coach.

Evaluation, Data Collection, and Reporting Agreements

Awardees agree to:

☐ Submit progress reports three times per year to OCDE.

☐ Submit fiscal expenditure reports three times per year to OCDE.

☐ Submit annual evaluation reports to OCDE, including a final project evaluation report within 3 months of the project conclusion.

Project Narrative

(20 pages maximum)
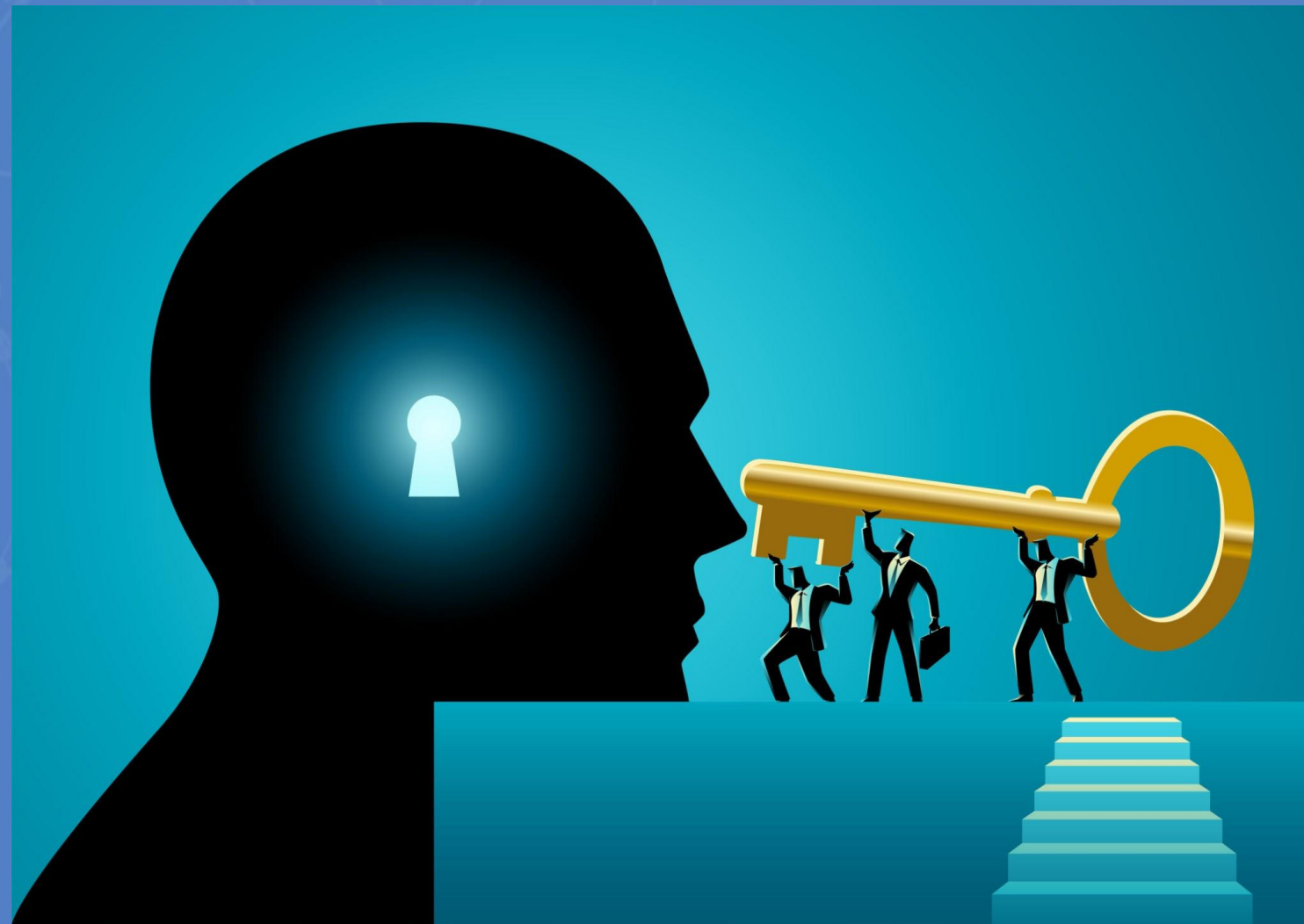
1. Project Need and Alignment

2. Project Design and Quality, including Implementation Plan

3. Feasibility of Project

4. Evaluation Planning

5. Strategies for Scaling and Sustaining the Innovation

RFA: See pages 15-23

Innovation Funding Initiative

Orange County Department of Education
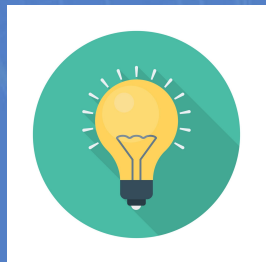
Project Narrative:
Project Need and Alignment

- Identify the need or challenge faced by students or schools that the project will address, and how the project will address the need
  - Must address a specific student group or priority area from California Dashboard/Differentiated Assistance (DA) eligibility

- Specify target population(s)

- Introduce the project, reference relevant theory or preliminary evidence guiding innovation

- Describe how the proposed project and anticipated outcomes align with district or school priorities & OCDE's 5-3-1 Plan

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Project Narrative:
Project Design and Quality

- Description of the project

- Project's main goals and objectives

- Detailed implementation plan, including timelines and progress indicators

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Project Narrative:
Project Feasibility

- Key district and school site personnel or positions involved & skills

- Roles and responsibilities

- School leadership involvement in developing the innovation and in the application process

- Applicant capacity and readiness for project implementation

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Project Narrative:
Evaluation Planning

- Describe how success will be measured

- Potential evaluation measures

- Complete Metrics Table - include both process and outcome measures

**Must include at least one student outcome

**At least one student outcome must be tied to a DA indicator or student group

** If funded, awardees will work with an OCDE Evaluator who will help support evaluation of the project

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Project Narrative:
Sustaining & Scaling

Sustainability

- Initial plan for sustaining the project (e.g., continued funding, potential partnerships, staff or resources to sustain innovation after project ends)

Scaling

- Initial plan for scaling the project during the project period, or after the project period ends
- Must include strategies for sharing experiences and project results, and how awardee will support/guide other partners in replicating the innovation in their own contexts

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Budget Workbook

Budget Template:

- 3-year budget

- Categories

- Brief description of expenses

- RFA: pages 9-10, 22-23, and guidance in Project/Budget Narrative Template and in Budget workbook

Orange County Department of Education
Innovation Funding
BUDGET
Funding Term: July 1, 2026 through June 30, 2029

Stefan Bean, Ed.D.
County Superintendent of Schools

From the Office of Grants & Funding
Date _____

☐ Approved

☐ Needs Revision

School District Name: _____   Date: _____

Budget Summary

CATEGORY	Year 1 Budget	Year 2 Budget	Year 3 Budget	Total	Brief Explanation of Use of Funds:
	July 1, 2026 - June 30, 2027	July 1, 2027 - June 30, 2028	July 1, 2028 - June 30, 2029		
	a	*b*	*c*	*d=a+b+c*	
1000 Certificated Salaries				-	
2000 Classified Salaries				-	
3000 Benefits				-	
4000 Books & Supplies				-	
5000 Services and Other Operating Expenditures				-	
6000 Capital Outlay				-	
7000 Indirect Costs [State Approved Rate _____%] *Max allowed is OCDE's state approved rate 2026-2027 projected at 9.32%*				-	
Total Budget	-	-	-	-	

Primary Project Leader Name and Title		Phone Number	Primary Project Leader Signature
			X

Fiscal Services Name and Title		Phone Number	Fiscal Services Signature
			X

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Budget Narrative

- Detailed description of expenses, by category
  - Salary, Benefits, Books & Supplies, Services/Other Operating Expenditures, Capital Outlay, Indirect Costs
- Justify why each cost is reasonable and necessary to achieve project objectives
- Align proposed expenses to project components and implementation plan
- Strategies to support non-staff expenses (e.g., technology, equipment)
- Leveraged or in-kind funding
- Does NOT count toward 20-page project narrative)

Innovation Funding Initiative

Allowable vs. Unallowable Costs

(Not exhaustive list- see pg. 9 of RFA)

✓

⚠️

(Need OCDE approval and provide clear description why necessary)

❌

- Curriculum development and instructional materials
- Professional development
- Salaries, benefits, and stipends for personnel
- Technology, equipment, or materials.
- Indirect costs allowed at district's state approved rate
- Subcontractors

- Capital expenditures - new construction
- Facilities costs
- Food or beverages
- Out of state travel/conference

- Costs that are not necessary, reasonable, clearly aligned
- Entertainment/social events
- Alcohol
- Lobbying, political activities, or fundraising expenses
- Gifts, awards, or souvenirs
- Costs that supplant existing state, local, or other funds
- Travel outside of the U.S.

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Appendix
(10 pages maximum)

- Metrics Table (required)

- Citations list (required)

- Logic model (optional)

- Tables or graphic to supplement text (optional *scoring of project is based on project narrative itself)

- Letters of support from partner(s) (optional)

- Letters of commitment (required for consortium applications; does not count toward page limit)

- Description of Consortium Partner Roles (required for consortium applications; does not count toward page limit, maximum 3 pages)

- Other supplemental materials the applicant believes will enhance their application

- RFA: See page 12

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Orange County Department of Education

Submission Process

RFA: See pages 11-14

Process

Email → **Email Attachments**

Submit to:
grantsandfunding@ocde.us

Subject Line:
"Innovation Funding Application: [Lead District Name - Brief Project Title]"

[Lead District Abbreviation]_Application:
- Application Checklist
- Applicant Information Form
- Applicant Agreement Form
- Project Narrative & Budget Narrative
- Appendix

[Lead District Abbreviation]_Budget:
- Budget Workbook

Note: Attachments should not exceed 30MB (combined) (if they do, use .zip file)

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Other Helpful Tips

❏ Use double-spaced, 12 point standard font, 1" margins

❏ Review scoring criteria for project narrative as you are creating your narrative

❏ Review point allocations - consider allocating more pages to sections with higher point value

Innovation Funding Initiative

Scoring

RFA: See pages 24-28

Scoring Categories & Process

Scoring Category	Total Points Available	Minimum Points Needed
Eligibility requirements	No points awarded. However, the applicant must meet eligibility requirements.	
Need and Alignment	20 points	10 points
Project Design & Quality	35 points	18 points
Feasibility of Project	25 points	13 points
Evaluation Planning	5 points	2 points
Strategies for Scaling and Sustainability	5 points	2 points
Budget Template and Narrative	10 points	3 points

Applicant must score a minimum of 60 points to be considered for an award. Please note that receiving the minimum number of points in each category does not total to 60 points, so applicants must score higher than the minimum in at least some of the categories to be considered for an award. Additionally, scoring 60 points does not guarantee funding.

Process:
Scoring round: blind review

Decision round: review applications selected by scoring round

Innovation Funding Initiative

Key Areas to Focus on in Narrative

1. Clear need and target population

   *align to CA Dashboard student group and/or priority areas

2. Description of innovation aligned to identified need

3. Clear goals, objectives, & implementation plan (timeline)

4. Key personnel, roles, & responsibilities

   * School site leadership involvement in design of project and application

5. Measures of progress & success, including metrics table

   * Must include **at least one student outcome**

6. Initial plans for sustaining the project

7. Initial plans to share experiences, lessons learned, & support for others to implement

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Supports Available

RFA: See pages 6-7

During the Application Process

- **Questions**: may be submitted in writing **by 1/20/26** to grantsandfunding@ocde.us

- **FAQs on Website** (check regularly; updated weekly)

- **Webinars**: December 11, 10:30-11:30 a.m. & December 17, 2-3 pm

- **Office Hours**: TBD (check website for updates)

- **Website**: Innovation Funding Initiative Website

- **Sign up for** listserv (updates emailed)

  - If you submit intent to apply, you will be added to the listserv

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During Implementation

Support from Implementation Coach and Innovations Evaluator

- 1:1 coaching/review meetings and group workshops

- Support with:

  - Developing metrics, data collection, and evaluation
  - Implementation monitoring, fidelity and improvement, as needed
  - Fiscal monitoring and reporting

Professional Learning Network

Innovation Funding Initiative

Reporting & Evaluation

- **Triannual** Progress and Fiscal Reports

- **Annual** Evaluation Reports

- **End of Project** Evaluation Report

Slide deck will be posted on OCDE Innovation Funding website

grantsandfunding@ocde.us

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