

Braiding and Blending Federal Funds: A Step-by-Step Guide for Illinois Schools

March 2023



REGION 9
Illinois
Iowa



Illinois
State Board of
Education

Braiding and Blending Federal Funds: A Step-by-Step Guide for Illinois Schools

Authors

Wayne Ball, Senior Technical Assistance Consultant

Beth Howard-Brown, Principal Technical Assistance Consultant

Kevin Junk, Technical Assistance Consultant

March 2023

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What does it mean to braid and blend funding? **Braiding** refers to the weaving together of federal, state, and local funding streams—and the development of funding strategies—to support high-quality programs. **Blending** involves comingling the funds into one “pot” in which leaders can draw down service dollars, pay for personnel expenses, or meet other program needs. A core purpose of braiding and blending is to support unified programming for students by coordinating resources to avoid duplication in services. The focus of this document is to provide guidance to support the braiding or blending of **federal grants**, but districts also should consider the available—and often more flexible—state and local fund sources as they develop coordinated funding strategies.

This guide has four parts. It begins with an overview of the community of practice that the Illinois State Board of Education (ISBE) and the Region 9 Comprehensive Center conducted to support Local Education Agencies (LEAs) in braiding and blending federal funding. Following some background information, the next section provides users with the steps for braiding and blending funds by using a specific tool (see also Appendix A), including a table of priority areas and federal funding categories and programs. The third section addresses reporting. The final section is a series of appendices, including Illinois guidelines (Appendix B), scenarios and examples from ISBE and several Illinois districts (Appendices C and D) for braiding and blending, additional examples of activities that can be supported by state and federal program funds (Appendix E), and resources (Appendix F) to inform those efforts.

Overview and Background

ISBE invited 10 districts to participate in a community of practice designed to increase understanding of how to braid and blend federal funds. District teams composed of principals, superintendents, business managers, and other district leaders participated in four 90-minute virtual sessions. The purpose of these sessions was to help leaders:

- Collaborate with other districts to increase their knowledge and understanding of how to braid and blend federal funds,
- Identify strategic considerations for mitigating common challenges that may arise when braiding and blending funds, and
- Identify tools and resources that can support the successful implementation of braiding and blending funds.

This guide was developed based on the community of practice work to inform other district and school leaders across Illinois about braiding and blending resource allocation strategies.

District and school leadership teams can use this guide to reflect on the resources within each category; engage in collaborative decision making with peers and stakeholders; and implement, monitor, or modify their plans to ensure transparent and equitable resource allocation. These activities can help district and school leaders connect their funding investments to clear goals for student support.

Passage of the Every Student Succeeds Act (ESSA) in December 2015 gave schools and districts flexibility when spending federal funds. Districts use braiding and blending to coordinate grant funds to support activities that drive performance and improve student outcomes. In Illinois, the Consolidated District Plan (CDP) can help districts successfully connect federal funding sources. The CDP allows grantees to answer one set of planning questions to meet the requirements for 12 federal formula grants (and, more recently, for federal Elementary and Secondary School Emergency Relief [ESSER] grants). The plan also allows districts to indicate their intent to braid and blend. District leaders must conduct a comprehensive needs assessment to establish the foundation for braiding and blending funds as they begin to develop their CDP.

Braiding and Blending Tool

Overview

This guide will walk users through the steps of braiding and blending funding using the tool in Exhibit 1, which also appears in full size in Appendix A. Each section of the tool includes key questions and considerations for teams to work through as they begin the process. The expectation is that a team will use the questions to guide its decision making.

Exhibit 1. Steps in Braiding and Blending

What initiative or activity has been identified as a need or priority?	
What local, state, and/or federal funds are eligible to braid or blend for this initiative?	What, if any, requirements are needed for specific funding streams?
Possible budgeting options for this initiative	
Sustainability considerations	
Next steps/questions to consider	

Note. Adapted from [Unlocking Federal and State Funds to Support Student Success](#) (Washington State Office of Superintendent of Public Instruction, 2020).

Step 1: Conduct a Comprehensive Needs Assessment

What initiative or activity has been identified as a need or priority?

Districts or schools should conduct a comprehensive needs assessment to determine what initiatives or activities to prioritize as they begin the braiding or blending process. A compelling needs assessment helps local stakeholders and system leaders understand how the pieces of a complex educational system interact. Whether that system reflects a school, a district, or an entire state, a needs assessment can uncover strengths and challenges that will inform growth and improvement. A needs assessment aims to help educators identify, understand, and prioritize the needs that districts and schools must address to improve performance. Determining the priority needs is the first in a series of closely tied steps that also include understanding the root causes that contribute to the areas of need, selecting evidence-based strategies that address those areas, preparing for and implementing chosen strategies, and evaluating whether those strategies are addressing improvement needs and achieving the desired results (Office of Migrant Education, n.d.).

Local stakeholders—not just a small group of leaders or an outside entity—should lead the needs assessment process. The process should engage school staff, parents, a diverse assortment of leaders, external support providers, and even students (but only at the secondary level). All of these people should have a role in each phase of the needs assessment—not just in the delivery of the results. This ensures that the planning, data collection, identified needs, and consideration of underlying causes incorporate the input of a broad knowledge base, including diverse local perspectives.

Questions to ask during the comprehensive needs assessment process may include the following (806 Technologies, 2020):

- Who are our stakeholders? Are they included in the planning process as authentic, valuable, and contributing partners in developing and implementing the improvement plan?
- Do our special programs align with the needs and desires of our students, parents, and community (e.g., gifted/talented, career and technical education, bilingual/English as a second language, special education, Title funding, fine arts, athletics)? Do the programs align with the philosophy and beliefs of our teachers and administrators?

- What are the trends in student behavior, including discipline referrals, suspensions, and expulsions? How are discipline issues affecting students and learning?
- What is the student mobility rate? What support systems are in place to assist these students? Where do students go and come from?
- What is the average class size, student-to-teacher ratio, and student-to-support staff ratio?
- How many students do we serve by race/ethnicity? List the percentage of each group: African American, Asian, Hispanic, White, Native American, Pacific Islander, and two or more races.

The findings from the needs assessment represent the foundation for building the CDP. Stakeholders, a key constituency of the needs assessment process, should collaboratively review relevant data and identify the areas that need improvement. These priority areas will serve as the basis for the CDP. The goal of the local CDP is to increase student achievement by improving the district’s use of federal, state, and local program funds to provide services to students and increase teacher capacity. The plan also offers local districts an effective process for ongoing, broad-based planning and shared decision making while involving all stakeholders in improving student learning. How funding will be used to support students should be discussed internally and externally with [stakeholders](#). Local stakeholders and district leaders should review existing programs and strategies alongside research on effective programs and strategies. These findings will support recommendations for program changes based on the data from the comprehensive needs assessment.

Step 2: Reflect on Resources Needed

What local, state, and/or federal funds are eligible to braid or blend for this initiative?	What, if any, requirements are needed for specific funding streams?
Possible budgeting options for this initiative	

Funding sources must be identified after priorities and initiatives are selected based on the needs assessment. Districts must determine which federal funds can be used to address the recommended programs and strategies as they build the CDP. Typically, federal education law requires funds to be spent on an identified program or initiative. To effectively braid or blend funds, one must decide which funds can address specific components of the CDP while acknowledging the kinds and levels of support that each funding program provides.

Districts could use funds from the following to braid:

- Title I, Part A—Improving Basic Programs
- Title I, Part A—School Improvement Part 1003
- Title I, Part D—Delinquent
- Title I, Part D—Neglected
- Title I, Part D—State Neglected/Delinquent
- Title II, Part A—Preparing, Training, and Recruiting High-Quality Teachers, Principals, and Other School Leaders
- Title III—Language Instruction Educational Program
- Title III—Immigrant Student Education Program
- Title IV, Part A—Student Support and Academic Enrichment
- Title IV, Part B—Rural and Low-Income Schools
- Individuals with Disabilities Education Act (IDEA), Part B—Flow-Through American Rescue Plan (ARP) ESSER III

Illinois only allows for hybrid blending of Titles I, II, and IV. The funds appear blended to the grant reviewer, but they maintain their original identity in the annual Consolidated State Performance Report (reported by ISBE only). The available options for transferability are as follows:

- Title II to Title I
- Title IV to Title I
- Title II to Title IV
- Title IV to Title II

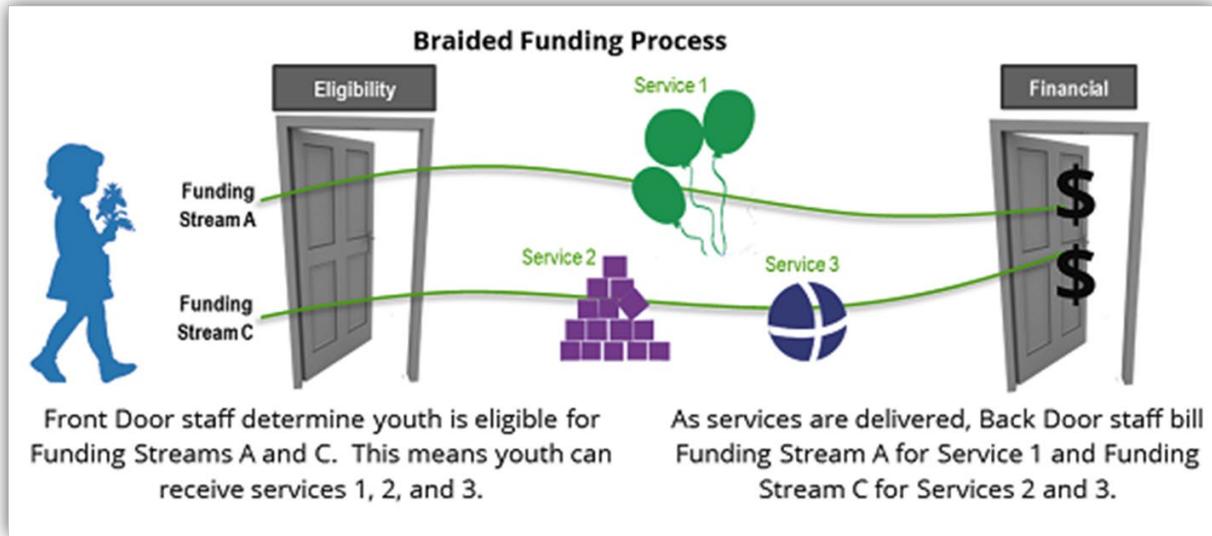
Developing a budget that reflects braiding or blending requires first organizing the budget by the types of service or support and then providing details on funding program revenue within each section of the budget. See the budget section of the planning template in Appendix A.

When determining whether a funding stream could be braided or blended with certain federal funds, answer the following questions to identify the applicable stream(s) to support the CDP (T4PA Center, 2021):

- What state and federal funds are eligible to braid or blend for the initiative?
- What is the intent of each federal program?
- Which funding programs have shared outcomes?
- What restrictions does each funding program have?
- Could braiding or blending funds from those identified programs violate the supplement, not supplant, clause?
- Could braiding funds from those identified programs violate maintenance of effort and excess cost requirements?
- Which supports and services based on the CDP will require ongoing versus onetime expenses?

Exhibit 2 shows that as students receive services, the finance staff bill the appropriate funding streams for the services. The funds are budgeted to the correct funding stream in the grant process. The financial officer would need to make sure that the allocated funds are being budgeted to the correct funding stream. Although all services could be billed to Funding Stream C, the financial officer decides to bill Service 1 to Funding Stream A, to ensure spend-down of the less flexible funding stream. The financial officer responsible for allocating funding streams to programming and services for all youth in this program would need to have the ability to choose the funding stream that will pay for the time and resources spent delivering services to youth. In this scenario—as is generally true with braided funding—all eligible students will benefit by having more services provided to them than the funding stream is supporting.

Exhibit 2. Braided Funding Process



Note. Sourced from [Colorado Guide 1: Blending and Braiding](#).

Exhibit 3 shows various priorities in which schools across Illinois have been spending their funds and provides examples of how schools can braid and blend a sample of federal grants to fund specific programs or priorities. There may be different scenarios depending on which programs students qualify for.

Exhibit 3. Crosswalk of Priorities and Federal Funding

Priorities	Title I, Part A ^a	Title 1003	Title I, Part C Migrant Ed.	Title II, Part A	Title III	Title IV, Part A	Rural Education Achievement Program	IDEA, Part B ^b	IDEA, CEIS ^c
Academic growth in English language arts	X	X			X			X	X
Academic growth in mathematics	X	X		X	X			X	X
Multitiered system of supports	X	X	X	X	X	X	X	X	X
Academic growth in science	X	X	X			X		X	X
Growth in science, technology, engineering, and mathematics skills		X		X		X		X	X
Early Warning Intervention Monitoring System	X	X		X		X		X	X
Climate and culture goals		X		X		X		X	X
Attendance improvement		X	X	X		X		X	X
Behavior improvement	X	X		X		X		X	X
Suspension reduction		X		X		X		X	X
Social-emotional learning/trauma-informed practices		X		X		X		X	X
Restorative practices	X	X		X				X	X
Family engagement	X	X		X				X	X
Comprehensive framework for communication, collaboration, and district alignment of improvement plans	X	X	X	X				X	X
100% completion of the District Facilities Plan		X				X		X	X
Comprehensive, aligned, and prioritized budget process to support district goals		X		X				X	X
Culturally responsive practices	X	X	X	X	X	X	X	X	X

^a The Illinois grant process allows hybrid blending for only Titles I, II, and IV funds.

^b IDEA Part B funds must be used for the excess cost of educating students with Individualized Education Programs (IEPs).

^c Coordinated Early Intervening Services (CEIS) funds must be used to assist students identified as needing assistance with academics or behavior, or to address areas of significant disproportionality for districts required to use CEIS funds.

Braiding and blending Title funds with ESSER funds provides an opportunity to develop a system that focuses on student social and emotional well-being and belongingness to mitigate the COVID-19 pandemic’s effect on students. For example, Title IV funds could be stretched further when combined with ESSER funds to create this system.

Step 3: Implementing, Monitoring, and Modifying Plans

Sustainability considerations
Next steps/questions to consider

The next step is implementing, monitoring, assessing results, and modifying your plan when needed. Implementation can begin after funding has been identified and the CDP has been developed based on the comprehensive needs assessment findings. However, benchmarks must be established to determine what level of performance is acceptable and in accordance with the values of your program and system. The [READI Framework](#), created by the Center on Great Teachers and Leaders, can assist with improvement initiatives.

Underserved schools often have fewer resources and less capacity to rigorously implement improvement strategies. As a result, the districts and schools that most need support programs are often least likely to adopt and implement them successfully—a phenomenon that we call the “needs paradox.” This paradox is amplified when states or districts overlook underserved schools for district or state-wide improvement initiatives because of their perceived lack of “readiness.” (Center on Great Teachers and Leaders, 2020)

Instead of viewing readiness as a mechanism to sort schools out of programs, the READI Framework helps schools and districts define readiness by assessing how well the improvement plan targets the specific needs of underserved schools and students. Ask yourself the following questions:

- Does your plan address **Resource** deficiencies?
- Does your plan target **Educator** supports?
- Does your plan consider **Accountability** requirements?
- Does your plan counteract **Disparities** in working conditions?
- Does your plan build the **Implementation** capacity of staff?

Progress monitoring is a necessary component of the improvement process. Monitoring the progress of the CDP should be based on previously established benchmarks. This ongoing process to collect and analyze data supports leaders as they determine whether modifications are necessary. The goal is to have regular checks instead of waiting for annual or biannual student testing.

Sustainability is another area of concern. How will initiatives that support students be continued when additional pandemic relief funding is no longer available? This discussion is important to have early rather than later. The Edunomics Lab at Georgetown University (2021) identified six common mistakes to avoid if you properly plan for sustainability:

- Spending in a way that creates a disruptive fiscal cliff
- Offsetting lost funds due to permanent enrollment declines
- Issuing problematic procurement contracts that come back to haunt leaders
- Deploying funds inequitably across schools
- Failing to make sure the school district community sees and values investments
- Investing without demonstrating real results for students

Reporting

The final piece in braiding and blending is reporting. This section of the guide discusses the reporting pieces that come after making certain your funds are being used correctly.

The [Grant Periodic Performance Report](#) allows districts to demonstrate transparency and accountability.

- Illinois requires periodic performance reports for all grants [unless specifically exempted](#) by the Grant Accountability and Transparency Act (GATA).
- Reports should include information on the accomplishment of deliverables described in the grant, the status of performance measures, and the alignment of accomplishments with spending.
- Annual reports¹ must be submitted in the ISBE Web Application Security portal and approved by ISBE.

¹ Grant Periodic Performance Reports are required annually, unless specified as more frequent due to program requirements or special conditions placed on the grantee.

Keep the following in mind when reporting on expenditures:

- Expenditure reports are submitted in [IWAS](#).
- Separate accounts must be maintained for each grant.
- Federal funds are spent properly on allowable costs that are approved in the grant budget.
- Sufficient evidence exists to prove the funds were spent properly.
- Financial records are sufficiently detailed to identify the source and application of grant funds to the individual expenditure level.
- Source documentation should be available to document expenditure alignment with the approved application budget.
- Confirm that expenditures in the general ledger can be reconciled to what was submitted in the Expenditure Report.
- Submit expenditure reports timely, accurately, and according to the [ISBE's State and Federal Grant Administration Policy, Fiscal Requirements, and Procedures manual](#).

Conclusion

The process of braiding and blending is highly recommended to districts and schools seeking to maximize the impact of federal grant funds. This guide provides the steps and tools to assist schools and districts in thinking through the process. The goal is to connect fiscal considerations with program planning while involving all stakeholders of the school community: families, students, staff, and other partners.

Exhibit 4 outlines an example of Braiding Scenario 1, which is in Appendix C.

Exhibit 4. Braiding Scenario 1: What to Consider When Planning for an Initiative

What initiative or activity has been identified as a need or priority?	
The LEA has a multitiered system of support (MTSS) in which federal program funds are used to serve each program’s subgroup of students.	
What local, state, and/or federal funds are eligible to braid or blend for this initiative?	What, if any, requirements are needed for specific funding streams?
<ul style="list-style-type: none"> Title I, Part A IDEA Title II Title III Title IV 	<ul style="list-style-type: none"> Consolidated District Plan Title I Schoolwide Plan GATA Reporting (Performance Reports) Expenditure Reimbursement Reports <p>In this example, the cost allocation is straightforward. Each grant program expends funds on a specific aspect of the MTSS. Because each expenditure is contained within an individual grant (i.e., no costs shared between or among grants), the costs are charged to and claimed within each individual grant directly as planned.</p>
Possible budgeting options for this initiative	
<ul style="list-style-type: none"> Title I, Part A: Costs related to the screener, the assessments, and the intervention program IDEA: Costs related to the supplemental intervention programming for children with disabilities Title II: Costs related to professional development on the intervention program for all teachers Title III: Costs related to supplemental intervention programming for English learners (ELs) Title IV: Costs related to the technology needs for the program 	
Sustainability considerations	
<ul style="list-style-type: none"> Additional carryover funds may not be available for the next school year. What other program could support these efforts in the following years? 	
Next steps/questions to consider	
<ul style="list-style-type: none"> Conduct training for new staff on MTSS during the summer. Can teachers receive stipends for summer professional development? 	

Note. Adapted from [Unlocking Federal and State Program Funds to Support Student Success](#) (Washington State Office of Superintendent of Public Instruction, 2020).

Disclaimer

This guide provides general information and guidance pertaining to the coordinated use of federal and state funds. As always, a final determination of whether a particular cost is allowable depends on the intent, purpose, and underlying facts and circumstances. Therefore, this guide does not constitute legal advice. Districts are advised to consult with legal counsel or program staff if questions arise when coordinating federal and/or state funds.

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Appendices

Appendix A. Braiding and Blending Tool

This appendix contains a template for braiding or blending funds.

What initiative or activity has been identified as a need or priority?	
What local, state, and/or federal funds are eligible to braid or blend for this initiative?	What, if any, requirements are needed for specific funding streams?
Possible budgeting options for this initiative	
Sustainability considerations	
Next steps/questions to consider	

Appendix B. Illinois Guidelines for Blending and Braiding

This appendix contains the Illinois guidelines related to blending and braiding funds.

Hybrid Blending

Currently, only hybrid blending (funds lose specific identity) of Titles I, II, and IV is available in the ISBE grant process:

- Transferability: Between Title II and IV or Title II and IV into Title I. Title I cannot be transferred.
- The funds appear blended to the grant reviewer and grantee; however, they maintain their original identity in the annual Consolidated State Performance Report (reported by ISBE only).

Hybrid Blending Scenario

Based on the comprehensive needs assessment, a district identified a need to provide early intervention services to students without disabilities who were struggling.

Resources

- Title I, Part A
- Title II, Part A
- Title IV, Part A

Reporting/Documentation²

- CDP
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports

In this example, the LEA receives Title I-A, Title II-A, and Title IV-A funds to provide early intervening services to nondisabled, struggling students, and is operating a schoolwide program in all district schools. The LEA wishes to implement an early warning system to identify struggling students. The LEA elects to consolidate its federal grant funds to support the district-wide initiative. The LEA could use any combination of available Title II and IV funds and transfer

² This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

to Title I in the consolidated pool to support the early warning system, so long as an early warning system is part of each district school's approved school-wide plan and based on a comprehensive needs assessment.

Braiding

Braiding financial assistance from several sources is coordinated to support a single initiative or strategy, whereas each individual award maintains its award-specific identity. No statutory authority is necessary. Braiding allows LEAs and schools to include other federal or state funding sources to reduce duplicate efforts for a holistic/comprehensive program.

Other Funding Sources for Braiding

In addition to the funds identified on page 6, the following are some examples of additional funding sources that can be braided:

- Title IV, Part B: 21st Century Community Learning Centers Evidence-Based Funding (primarily blending except for the money designated for ELs)
- Carl D. Perkins Career and Technical Education
- Early Childhood
- Evidence-Based Funding (primarily blending except for the money designated for ELs)
- Coronavirus Response and Relief Supplemental Appropriations Act
- American Rescue Plan Act of 2021

Braiding and Allocability

When braiding multiple funding sources to support a single project, LEAs must demonstrate that the costs charged to each federal program were allocable to that program. This standard is met if the cost:

- Is incurred specifically for the grant award;
- Benefits both the grant award and other work of the grantee and can be distributed in proportions that can be reasonably approximated; and
- Is necessary to the overall operation of the grantee and is assignable in part to the federal award in accordance with the principles in Subpart E – Cost Principles of 2 C.F.R. § 200.400.

Appendix C. Braiding Funding Scenarios

The following scenarios were developed by ISBE to help districts understand how to braid their funds so that they can maximize the support given to students. Two scenarios relate to the COVID-19 pandemic: learning loss (Scenario 2) and the social and emotional well-being of students (Scenario 4). These scenarios originally appeared in an [ISBE webinar](#).

Braiding Scenario 1

The LEA has a multi-tiered system of support (MTSS) in which federal program funds are used to serve each program's subgroup of students.

Resources

- Title I, Part A
- IDEA
- Title II
- Title III
- Title IV

Reporting/Documentation³

- CDP
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports

In this example, the cost allocation is straightforward. Each grant program expends funds on a specific aspect of the MTSS. Because each individual expenditure is contained within an individual grant (i.e., no costs shared between or among grants), the costs are charged to and claimed within each individual grant directly as planned.

³ This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

The costs claimed are as follows:

- Title I, Part A: Costs related to the screener, the assessments, and the intervention program
- IDEA: Costs related to the supplemental intervention programming for children with disabilities
- Title II: Costs related to professional development on the intervention program for all teachers
- Title III: Costs related to supplemental intervention programming for English learners (ELs)
- Title IV: Costs related to the technology needs for the program

Braiding Scenario 2

To mitigate learning loss, the LEA will offer a summer school program.

Resources

- ARP ESSER III
- Title I, Part A
- IDEA
- Title II
- Title III

Reporting/Documentation⁴

- CDP
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—LEA

In this example, the cost allocation is straightforward. Each grant program expends funds on a specific aspect of the Learning Loss Plan. Because each individual expenditure is contained within an individual grant (i.e., no costs shared between or among grants), the costs are charged to and claimed within each individual grant directly as planned.

⁴ This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

The costs claimed are as follows:

- ARP ESSER III: Costs related to teacher salaries and benefits
- Title I, Part A: Costs related to supplemental materials and supplies for the summer school program
- IDEA: Costs related to supplemental intervention programming for children with disabilities for the summer school program
- Title II: Costs related to professional development on the summer school program for all teachers
- Title III: Costs related to supplemental programming to support ELs for the summer school program
- Title IV: Costs related to the well-rounded curriculum for summer school program

Braiding Scenario 3

To support the inclusion of students with disabilities in the general education environment, the district will increase opportunities for coteaching by general and special educators.

Resources

- ARP ESSER III
- IDEA
- Title II
- Title III

Reporting/Documentation⁵

- CDP
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—LEA

⁵ This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

Shared Grant Expenditures Cost Allocation Example 1

Expense amount = \$10,000

The costs for adaptive software application and supplies for children with disabilities are allocated to IDEA and ARP ESSER III based on the ratio of those programs’ personnel costs (salaries and applicable benefits) to the total of such personnel costs as follows:

Grant	Personnel costs	Percentage	Amount allocated
IDEA	\$100,000	67%	\$6,700
ARP ESSER III	\$50,000	33%	\$3,300
Total	\$150,000	100%	\$10,000

Shared Grant Expenditures Cost Allocation Example 2

Expense amount = \$10,000

The costs for adaptive software application and supplies for children with disabilities are allocated to IDEA and ARP ESSER III based on the ratio of each program’s expenses (direct costs other than salaries and applicable benefits) to the total of such expenses as follows:

Grant	Program costs	Percentage	Amount allocated
IDEA	\$75,000	75%	\$7,500
ARP ESSER III	\$25,000	25%	\$2,500
Total	\$100,000	100%	\$10,000

Braiding Scenario 4

To address the district’s disproportionate number of suspensions for Hispanic students with disabilities, the district will focus on its social and emotional learning programming.

Resources

- IDEA
- ARP ESSER III
- Title I, Part A
- Title III
- Title IV, Part A

Reporting/Documentation⁶

- CDP
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—LEA

Shared Grant Expenditures Cost Allocation Example 1

Expense amount = \$40,000

The costs for additional instructional and assessment materials for social and emotional learning materials are allocated to IDEA and ARP ESSER III based on the ratio of each program’s expenses (direct costs other than salaries and applicable benefits) to the total of such expenses as follows:

Grant	Personnel costs	Percentage	Amount allocated
IDEA	\$250,000	83%	\$33,200
ARP ESSER III	\$50,000	17%	\$6,800
Total	\$300,000	100%	\$40,000

Shared Grant Expenditures Cost Allocation Example 2

Expense amount = \$40,000

The costs for additional instructional and assessment materials are allocated to IDEA and ARP ESSER III based on the ratio of each program’s expenses (direct costs other than salaries and applicable benefits) to the total of such expenses as follows:

Grant	Program costs	Percentage	Amount allocated
IDEA	\$175,000	70%	\$28,000
ARP ESSER III	\$75,000	30%	\$12,000
Total	\$250,000	100%	\$40,000

⁶ This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

Braiding Scenario 5

Based on a comprehensive needs assessment, the district will implement a sheltered instruction observation protocol in all general education classrooms to meet the needs of ELs.

Resources

- Title I, Part A
- Title II, Part A
- Title III
- IDEA

Reports/Documentation⁷

- CDP
- Title I Schoolwide Plan
- Bilingual Service Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports

This cost allocation is straightforward. Each grant program expends funds on a specific aspect of the schoolwide sheltered instruction observation protocol. Because each individual expenditure is contained within an individual grant (i.e., no costs shared between or among grants), the costs are charged to and claimed within each individual grant directly as planned.

Financial Management Considerations (apply to all scenarios)

- Federal funds are spent properly on allowable costs (i.e., reasonable, necessary, and allocable⁸).
- Sufficient evidence exists to prove the funds were spent properly.
- Financial records are sufficiently detailed to identify the source and application of grant funds to the individual expenditure level.

⁷ This list of potentially required documentation is not exhaustive. Be sure to consult with your district's auditor for other financial reporting requirements.

⁸ 2 CFR Part 200.403 – 200.405

Appendix D. Examples From the Field

The following examples were provided by finance and program leaders in three Illinois school districts. These examples demonstrate approaches for braiding categorical and emergency grants (ESSER) to fund programming that directly targets student needs. Additionally, district leaders indicate plans for evaluating and sustaining programs beyond the ESSER obligation window.

Braiding in Joliet Township High School District 204: Intervention Labs for Academic and Social-Emotional Learning Support

District Profile

Number of Schools: 2

Grades Served: 9–12

Enrollment and Demographics:

- 6,838 students
- 58% low-income students
- 14% students with IEPs
- 13% English learners

FY22 Per-Pupil Spending: \$15,769

EBF Tier: 1 (64% Adequacy)



Note. EBF is evidence-based funding. IEP is individualized education program. All data are from the 2021–2022 Illinois Report Card.

2023 CDP Statement

The district reviews its strategic plan throughout the year to determine which goals should be prioritized and to identify resources and supports needed to ensure alignment with our programs as well as allocations from federal resources. All federal resources used are aligned to this strategic plan and adhere to federal guidelines. The district adheres to monthly monitoring to ensure expenditures are appropriate and allowable. Deliverables purchased through the grants to carry out activities and programs are monitored and assessed periodically by building and district teams.

Braiding Example

Joliet Township High School District 204 has introduced a variety of comprehensive academic and behavioral interventions in order to support students after the challenges students encountered through remote learning as a result of the COVID-19 pandemic.

Resources

- Title I, Part A—Improving Basic Programs
- Title I, Part A—School Improvement Part 1003
- Title IV, Part A—Student Support and Academic Enrichment
- ARP ESSER III—Elementary and Secondary School Emergency Relief III

Reporting Documentation

- CDP
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—Local Education Agency

Cost Allocation Methodology

For this program, the cost allocation is straightforward. Each program expends funds on a specific aspect of the intervention program costs. Because each expenditure is contained within an individual grant (i.e., no costs are shared between or among grants), the costs are charted to and claimed within each individual grant directly as planned.

The costs claimed are as followed:

- Title I, Part A: Materials and supplies for district-wide interventions
- Title 1, Part A–1003: Materials and supplies for interventions at Joliet Central High School (a school with a 2019 Summative Designation of “Targeted”)
- Title IV: Materials and supplies for social-emotional/behavioral interventions using the Safe and Healthy School program
- ARP ESSER III: Math interventionist salaries and benefits; Panorama SEL screener; ReThink Substance Use intervention costs; and Home Visit Liaison salaries

Program Evaluation

The effectiveness of programs introduced through this use of federal funding will be monitored through student performance in the areas of school attendance, behavior, and academic performance. Students participating in any of the intervention programs are flagged in the Panorama platform, and their performance is monitored by their intervention providers and support team members. Student growth is evaluated using the STAR assessment platform in English and math. SEL and behavioral growth are monitored through Panorama SEL screeners, increases in attendance rates from month to month, and decreases in behavior referrals.

Sustainability Planning

No new program is introduced at Joliet Township High School District 204 without a plan to sustain the program beyond the life of any particular grant, provided that it has been determined to be an effective means of supporting student achievement through data monitoring. All of the components contained within this example of braided federal funds using the ESSER grants will move into evidence-based funding (EBF) or local funds upon the end of those grant cycles, so long as the program evaluation outlines a level of effectiveness warranting their continuation. As other funding sources (Title and IDEA) need to be utilized for other innovative programming, components of this plan under those grants may also be moved into EBF and local funds if the effectiveness continues to be supported by student outcomes.

Braiding in Harvard Community Unit School District 50: Instructional Coaching

District Profile

Number of Schools: 5

Grades Served: PK–12

Enrollment and Demographics:

- 2,502 students
- 41% low-income students
- 14% students with IEPs
- 38% English earners

FY22 Per-Pupil Spending: \$14,196

EBF Tier: 1 (60% Adequacy)



Note. EBF is evidence-based funding. IEP is individualized education program. All data are from the 2021–2022 Illinois Report Card

2023 CDP Statement

Harvard Community Unit School District 50 has districtwide goals and plans in place that drive decisions and priorities. These guiding principles are developed in a collaborate process with stakeholders. Funds are allocated to initiatives and programs that support the overall goals of the district.

Braiding Example

To address academic needs in Harvard Community Unit School District 50, the district will continue to support the instructional coaching program by using funds to support staff, resources, and professional development.

Resources

- ARP ESSER III—Elementary and Secondary School Emergency Relief III
- Title I, Part A—Improving Basic Programs
- Title I, Part A—School Improvement Part 1003
- Title II, Part A—Preparing, Training, and Recruiting High-Quality Teachers, Principals, and Other School Leaders

- Title III—Language Instruction Educational Program
- Title IV, Part A—Student Support and Academic Enrichment

Reporting Documentation

- CDP
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—Local Education Agency

Cost Allocation Methodology

In this braiding scenario, each expenditure is charged to a specific grant.

- ARP ESSER III: Instructional coach salary and benefits
- Title I, Part A: Instructional supplies to support programs, professional development
- Title I, Part A—1003: Instructional supplies for individual school needs outlined in the school improvement plan, supported by the instructional coaches
- Title II: Professional development
- Title III: Instructional supplies, professional development supported by instructional coaches related to the specific needs of ELs

Program Evaluation

The instructional coaching program is evaluated by the same means in which the district evaluates student growth and achievement.

Sustainability Planning

Harvard had an established instructional coaching program through EBF that was in place prior to the introduction of ESSER funding. ESSER funding gave Harvard the opportunity to expand the program to include an additional coach, resources, and professional development. Five of the six coaching positions were wrapped into district funds initially through EBF and now as part of the annual budget. To sustain support of the instructional coaching program after the ESSER obligation window, the district will identify and prioritize key elements of the program that must remain intact to continue to impact student growth. As a further braiding of funds, the ESSER-funded instructional coach position can move to EBF for the following year and

remain in the district budget after that. The district will also utilize other federal funding to support the program.

Braiding in Danville School District 118: Expanding the School Year With ESSER

District Profile

Number of Schools: 10

Grades Served: PK–12

Enrollment and Demographics:

- 4,765 students
- 79% low-income students
- 18% students with IEPs
- 4% English learners

FY22 Per-Pupil Spending: \$17,493

EBF Tier: 1 (70% Adequacy)



Note. EBF is evidence-based funding. IEP is individualized education program. All data are from the 2021–2022 Illinois Report Card

2023 CDP Statement

Danville School District 118 will align federal, state, and local resources to implement the activities planned for increased student achievement and social emotional support in all schools. A needs assessment was given and results reviewed to guide district plans. Expenditures are braided through federal, state, and local resources.

Braiding Example

Danville School District 118 will provide after-school tutoring and extended-year opportunities utilizing district staff, community agencies, and retired teachers for Grades PreK–12 for the 2021–22, 2022–23, and 2023–24 school years. Tutoring will also be available 5 afternoons per week at the women’s shelter for McKinney Vento students. The PreK through 12th-grade school year is extended through focused summer school curriculum with individual student plans, credit recovery tutoring, virtual tutoring, and enrichment workshops. These activities were a part of our 3-year plan to address the learning gap from the COVID-19 pandemic. Funds will be braided to provide these opportunities for our students.

Resources

- Title I, Part A—Improving Basic Programs
- Special Education District Funds
- Title I, Part A—School Improvement Part1003
- ARP ESSER III—Elementary and Secondary School Emergency Relief III
- State After School Programs Grant
- ARP Homeless Children and Youth (HCY) Part II (McKinney Vento) Grant

Reporting Documentation

- CDP
- District Three-Year Return to Learn Plan
- Title I Schoolwide Plan
- GATA Reporting (Performance Reports)
- Expenditure Reimbursement Reports
- ESSER Recipient Data Collection—Local Education Agency

Cost Allocation Methodology:

Cost claimed are as follows⁹:

- Title I, Part A: Stipends and benefits for tutors
- Title I, Part A–1003: Stipends and benefits for tutors at targeted and comprehensive schools
- After school program grant: Stipends and benefits for tutors; supplies for programs
- ARP ESSER III: Stipends and benefits for tutors; payments to community agencies who support our students with academic and social emotional opportunities; transportation for after school and extended-year programs
- ARP HCY Part II (McKinney Vento): Stipends and benefits for shelter tutors; supplies for students
- Special education district funds: Stipends and benefits for extended-year teachers; supplies for the program

⁹ No costs are shared among grants; the costs are charged to and claimed within each individual grant.

Program Evaluation

By providing after-school tutoring and extended-year opportunities in academics, social-emotional learning, and enrichment, students will increase their academic achievement by 10% on local and state assessments to address learning loss from the COVID-19 pandemic.

Sustainability Planning

By design, the after-school tutoring, shelter tutoring, and extended-year activities will be sustained with Title grants. ESSER III and ARP HYC Part II (McKinney Vento) funds were used to supplement these programs that were already in place. Community agencies have agreed to continue to provide services to our students by obtaining their own grants or funding through other community resources.

Appendix E. Examples of Activities for State and Federal Program Funds to Support

This appendix defines each funding source and the potential activities and strategies that LEAs may choose to braid and blend their funds.

Exhibit D1. Funding Sources and Sample Activities or Strategies

Funding source	Definition and sample activities or strategies that may be funded
<p>Title I, Part A</p>	<ul style="list-style-type: none"> • Improving Basic Programs provides supplemental funding to state and local education agencies (LEAs). The funding provides resources to LEAs and schools with high percentages of children from low-income families. Title I resources improve education quality and help ensure that all children meet challenging state academic standards. Title I services focus on children who are failing or who are most at risk of failing to meet state academic standards. • Title I, Part A funds may be used for some or all activities associated with implementing the components of an MTSS, specifically supporting Tier 2 and Tier 3 activities and options. • Both Title I, Part A program models (Schoolwide and Targeted) must conduct a comprehensive needs assessment. • The comprehensive needs assessment directs a school to collect and analyze student data. This process identifies the strengths and weaknesses influencing student performance. It also sheds light on the needs of the entire program. <p>Examples</p> <ul style="list-style-type: none"> • Provide small-group intervention services for reading to students who demonstrate a need based on the results of a universal screening tool. • Hire and pay for intervention teachers (e.g., salary). • Purchase supplementary materials needed to address students’ needs in specific areas of reading. • Purchase and use a data management system, including data analysis tools, such as an Instruction Improvement System, to help educators manage and analyze eligible student data to improve instruction and decision making. • Provide professional learning on intervention strategies (e.g., hire consultants, send educators to training, purchase materials) to ensure the effective implementation of interventions.

Funding source	Definition and sample activities or strategies that may be funded
<p>School Improvement (Comprehensive and Targeted Supports): Title 1003</p>	<ul style="list-style-type: none"> • To competitively provide Section 1003(g) School Improvement Grant funds to LEAs for use in Title I schools identified for priority services that demonstrate the greatest need for the funds and the strongest commitment to use the funds to provide adequate resources to substantially raise the achievement levels of their students and enable the schools to make adequate yearly progress and to exit priority status. • These funds may be used to support Comprehensive and Targeted assistance schools and to support districts with at least two thirds of their schools identified for support. <p>Examples</p> <ul style="list-style-type: none"> • Provide funds to develop and implement Comprehensive and Targeted Support (three or more student groups) school plans. • Provide funds for LEAs to monitor schools receiving these funds and to address areas of need as identified through the monitoring process. • Use funds to institute a rigorous review process to recruit, screen, select, and evaluate external partners who partner with the LEA. • Use funds to increase participation of parents in school planning, review, and improvement.
<p>Title III, Part A</p>	<p>Although funds received under Title III, Part A may be used to support the implementation of MTSS, allowable uses are specific to Title III–eligible students. Funds may be used to implement some activities associated with implementing the components of MTSS for only ELs and/or migrant students.</p> <p>Examples</p> <ul style="list-style-type: none"> • Provide professional learning: Title III, Part A funds may be used to provide professional learning to classroom teachers regarding the English Language Proficiency Standards and EL instruction strategies to improve the effectiveness of core instruction for ELs. Funds also can be used to provide the same professional learning to interventionists to improve the effectiveness of interventions for ELs. • Purchase instructional materials designed to support ELs with language acquisition and meaningful access to content instruction. • Support additional collaboration time for the EL specialist.

Funding source	Definition and sample activities or strategies that may be funded
	<ul style="list-style-type: none"> • Hire EL student advocates: A school receives an influx of Somalian students with interrupted formal education. Many of these students are several grade levels behind. The LEA may use Title III, Part A, Immigrant funds for the salary of a new EL student advocate to help students with their adjustment to the school. Advocate duties may include the following: <ul style="list-style-type: none"> – Address specific needs of refugee students and students with interrupted formal education, including trauma. – Meet the needs of long-term ELs, including intensive college counseling and promotion of ELS after high school learning. – Meet with ELs to consult, check grades, and meet specific language needs. – Support district efforts to substantially improve and sustain the academic achievement of all ELs. – Work collaboratively with teachers regarding best practices supporting ELs in their core classes. – Conduct regular visitations to EL and core classrooms; initiate conversations with content/core teachers about best practices for ELs. – Assist teachers and administrators in recognizing and responding to the unique needs of ELs as well as understanding cultural nuances that affect their learning. – Extend instructional time: A school has ELs who need additional instruction time to master the sixth-grade mathematics curriculum. The LEA may use its Title III, Part A funds to provide an extended-day bilingual mathematics tutorial program (e.g., stipends for teachers, materials, and supplies).
<p>Title IV, Part A</p>	<ul style="list-style-type: none"> • Provide Title IV grants to districts to improve student’s academic achievement by increasing the capacity of states, LEAs, schools, and local communities to (a) provide all students with access to a well-rounded education, (b) improve school conditions for student learning, and (c) enhance the use of technology to improve the academic achievement and digital literacy for all students. • Under the Safe and Healthy Students focus, Title IV, Part A funds may be used to support a variety of programs that positively impact safe and supportive learning environments, as well as students’ physical, social, emotional, and mental health. This is an opportunity for schools to promote activities that are inclusive of all students and/or to target services to specific students.

Funding source	Definition and sample activities or strategies that may be funded
	<p>Examples</p> <ul style="list-style-type: none"> • Provide social and emotional learning supports for all students and for students needing additional supports (e.g., Tier 2 and/or Tier 3). • Use funds to purchase a social and emotional learning curriculum and provide training for all staff on its use, as well as training on how to integrate the programming into all areas of academic instruction (e.g., Tier 1). • Use funds to purchase a universal screener to identify students in need of smaller group meetings to reinforce social-emotional topics. Funds also may be used to hire additional staff or provide advanced staff training to work with identified students in small groups (e.g., Tier 2). • Use funds to provide additional staff hours for guidance counselors or to contract with expert external partners to work with students one on one (e.g., Tier 3).
<p>IDEA, Part B</p>	<ul style="list-style-type: none"> • IDEA Part B Flow-Through: This program provides supplemental funds to ensure that all children with disabilities ages 3 through 21 receive a free appropriate public education (FAPE) in the least restrictive environment. Funds may be used to support the salaries of staff who provide services for students receiving special education services. These staff may include teachers, aides, administrative staff, and personnel such as social workers, psychologists, and physical therapists. Funds also may be used to support training and specialized consultants and to purchase instructional supplies, materials, and equipment. • IDEA Part B Discretionary: These funds are used for leadership grants to improve special education services in Illinois. The grants are awarded to districts, joint agreements, other public institutions, and private organizations involved in special education. In addition, these funds are used to pay for administrative discretionary activities. Currently, these funds are used for Assistive Technology Grants, the Illinois Special Education Leadership Academy Grant, the Deaf and Hard of Hearing Grant, the Illinois Service Resource Center Grant, the Philip J. Rock Project Reach Grant, the Multi-Tiered Systems of Support Grant, and the Autism Learning and Supports Project. • IDEA, Part B funds must be used to pay only the excess costs of providing FAPE to students with disabilities. Students with individualized education programs (IEPs) may receive instruction at any tier in MTSS in coordination with the supports provided in their IEPs.

Funding source	Definition and sample activities or strategies that may be funded
	<p>Examples</p> <ul style="list-style-type: none"> • Provide supplementary materials, curricula, and services specific to the needs of only those students with IEPs, in any of the three tiers of instruction and intervention. • Provide supplementary assessments and accommodations that are necessary to include students with disabilities in any LEA assessment process (e.g., an alternative assessment for reading administered to eligible students with significant cognitive disabilities on the same schedule as the LEA’s reading assessment administered to all other students). • Hire staff members whose participation in instruction, problem solving, data analysis, and professional learning relates to students with disabilities (e.g., special education teacher, school psychologist, learning consultant, behaviorist, social worker). • Provide activities to promote parent and family engagement and a positive school climate when including students with disabilities and/or their families. • Provide supports, interventions, and activities necessary for the meaningful integration and inclusion of students with disabilities. • Identify activities to help reduce paperwork, including expanding the use of technology in the IEP process (e.g., a data management system, such as an Instruction Improvement System). • Provide a student with an IEP a specific software program during small-group time to supplement the small-group instruction provided to other students in the literacy block (e.g., general education class, Tier 1) as per the student’s IEP. IDEA, Part B funds may be used to purchase the software.

Funding source	Definition and sample activities or strategies that may be funded
<p>IDEA, Part B, Coordinated Early Intervening Services</p>	<p>IDEA Part B Preschool</p> <ul style="list-style-type: none"> • This program provides funds to employ staff and purchase materials or supplies to supplement a comprehensive special education program for children with disabilities ages 3 through 5. • LEAs may use up to 15% of their IDEA, Part B funds to assist students in Grades K–12 who do not currently have an IEP but who require additional academic and behavioral support. <p>Examples</p> <ul style="list-style-type: none"> • Use IDEA, Part B CEIS funds to pay for the teacher and the materials for that intervention for those identified students. The students receiving this intervention would be part of the CEIS tracking mechanism. • Provide behavioral interventions to students who are not identified as students with disabilities who receive a certain number of office referrals as part of a positive behavioral interventions and support initiative. • Fund reading or mathematics specialists to work with students who do not have IEPs and have not reached grade-level proficiency in those subjects. The students receiving this intervention would be part of the CEIS tracking mechanism.

Appendix F. Resources

This appendix contains resources to assist with the process of blending and braiding funds. It begins with federal and state-level websites. Then, it presents resources to assist with completing a comprehensive needs assessment and some additional braiding and blending resources, including resources from the Edunomics Lab.

Websites

Federal Resource

ESSA Law: [Every Student Succeeds Act \(ESSA\) | U.S. Department of Education](#)

Illinois State Resources

- <https://www.isbe.net/>
- https://www.isbe.net/Documents/fiscal_procedure_handbk.pdf
- <https://www.isbe.net/Documents/Blending-and-Braiding-061121.pdf>

Comprehensive Needs Assessment

Needs Assessment Guidebook

This guidebook will support state and local leaders in the first step in the improvement process: developing and facilitating a needs assessment. It reviews some of the significant needs assessment requirements related to school improvement found in the Elementary and Secondary Education Act (ESEA), as amended by ESSA; introduces the elements of a successful needs assessment; presents a practical approach to addressing those elements across the phases of needs assessment implementation; describes supports that states can provide to districts, and districts to schools, in the implementation of effective needs assessments; and discusses the role of the needs assessment within a continuous improvement process. Links to publicly available tools and resources on this topic are in the Resources section. In addition, Appendix A includes a two-page Quick Reference Guide that summarizes the main framework of the guidebook.

Needs Assessment Development Modules

This tool provides states and districts with the materials to conduct their own meetings to develop a needs assessment process. The tool includes a draft facilitator's guide, a slide presentation, and handouts that may be customized based on the state or district context.

Georgia Comprehensive Needs Assessment

[Georgia Department of Education District-Level Template/School-Level Template](#)

This resource is a tool that districts and schools can use to develop and implement the comprehensive needs assessment process. The template provides users with a definition of each component of the process to assist in completing the various phases of the needs assessment.

[Forsyth County](#)

This document is a publicly available copy of a completed comprehensive needs assessment using Georgia’s School-Level Template.

Colorado Guide for Comprehensive Needs Assessment

This resource serves as another guide for districts and schools when completing a comprehensive needs assessment process. The guide defines the process, moves into the planning for the comprehensive needs assessment, and describes the decision-making process after completing the assessment. Appendices include a checklist for the process, federal legislative summaries, and consolidated application needs assessment requirements.

Additional Braiding and Blending Resources

[Unlocking State and Federal Program Funds to Support Student Success](#)

This lengthy document provides multiple examples of how to braid and blend funds for various program types. The programs include MTSS, professional learning, parent and family engagement, and a positive school climate. Each example details the funds that could be braided and includes examples of how they could be used. The document also describes federal and state programs and their potential uses and requirements.

[Blended and Braided Funding: A Guide for Policy Makers and Practitioners](#)

This guide was published in December 2014; however, the information it provides regarding braiding and blending is still valuable. Key chapters include Chapter 1, which provides an overview of braiding and blending and describes the threats—fragmentation, overlap, and duplication—to the effective use of funding; and Chapter 3, which focuses on education, primarily discussing the ESEA.

[Braiding Funds to Enhance Title IV-A Program Efficiency and Outcomes](#)

Although this brief document mentions blending funds, it focuses on braiding them. The document provides visuals, key questions to ask when braiding funds, and a five-step approach:

1. Conduct a comprehensive needs assessment.
2. Create a consolidated plan with stakeholders and representatives from each program.
3. Decide which funding programs can help address each aspect of the consolidated plan.
4. Develop a budget to reflect braided funding.
5. Monitor performance/improvements and effectiveness of resources.

[Braiding and Blending Your Funds](#)

This slide deck from the Georgia Department of Education defines braiding and blending. It then provides a link to another document that discusses how braiding and blending would work regarding the Whole Child Toolkit. The deck also provides scenarios for various situations, including challenges, engagement, and healthy and safe environments.

[Braiding Federal Funding to Expand Access to Quality Early Care and Education and Early Childhood Supports and Services: A Tool for States and Local Communities](#)

This resource defines braiding, blending, and layering and provides a process for braiding. The first step in this process is to identify funding streams. The tool includes a list of possible funding streams with links to details for each. Under Step 6 of the process guide, the resource includes a list of lessons learned, complete with links to other documents with specific page numbers.

[Resource Allocation Strategies to Support the Four Domains for Rapid School Improvement](#)

Although this document includes a brief section defining braiding and blending, the focus is on resource allocation. The document poses four principles for effective resource allocation: (a) consider resources beyond just funding; (b) establish priorities through stakeholder engagement; (c) blend, braid, and layer resources; and (d) equitably distribute resources. The document then applies these principles to four situations that schools may face: turnaround leadership, talent development, instructional transformation, and culture shift.

Ednomics Lab Resources

Ednomics Lab article: [5 Mistakes to Avoid When Spending COVID-Relief Funds](#)

This article is for district staff to read before spending district COVID relief funds. District staff will learn five ways to avoid making mistakes in spending their funds so that they can maximize their funds for their students' benefit.

Ednomics Lab slides: [Engaging Principals in School-Level Financial Data to Boost Student Achievement](#)

This slide deck spells out why it is essential to engage principals when it comes to spending money within their buildings. District staff can review these slides to leverage their building principals' insights on how to best fund each of their buildings equitably.

Communicating With Stakeholders: [Sentence Prompts](#)

This resource provides districts with sentence stems to ensure that thought and consideration are given when it comes to making the connection between investments and students.

Illinois Expenditures and Outcomes: [Scatterplots](#)

This Comprehensive Center Network resource allows users to view data visualizations of spending and achievement data for schools in Illinois and other states. Districts can use this tool to explore more comparison schools and to inform local dialogue about the connection between resources and outcomes.

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American Institutes for Research®
1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
+1.202.403.5000 | AIR.ORG