Innovation Funding Initiative

Investing in bold ideas.
Creating lasting impacts.



COHORT 2

Request for Applications (RFA) Overview

Office of Grants & Funding

Orange County Department of Education

October 2026



Hosts/Grants & Funding Team

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Webinar Overview

- Initiative Overview
- Logistics
- Intent to Apply
- Application Components
- Submission Process
- Scoring
- Support Available

Many slides have links that lead directly to more information, forms and templates.

Pink font in the slides reflects changes or additions made for Cohort 2.



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 (Resources page) within 24 hours after the 2nd webinar concludes (ocde.us/innovationfunding)
- This same webinar will be held on both October 13, 10-11 am and October 21, 2-3 pm



Initiative Overview

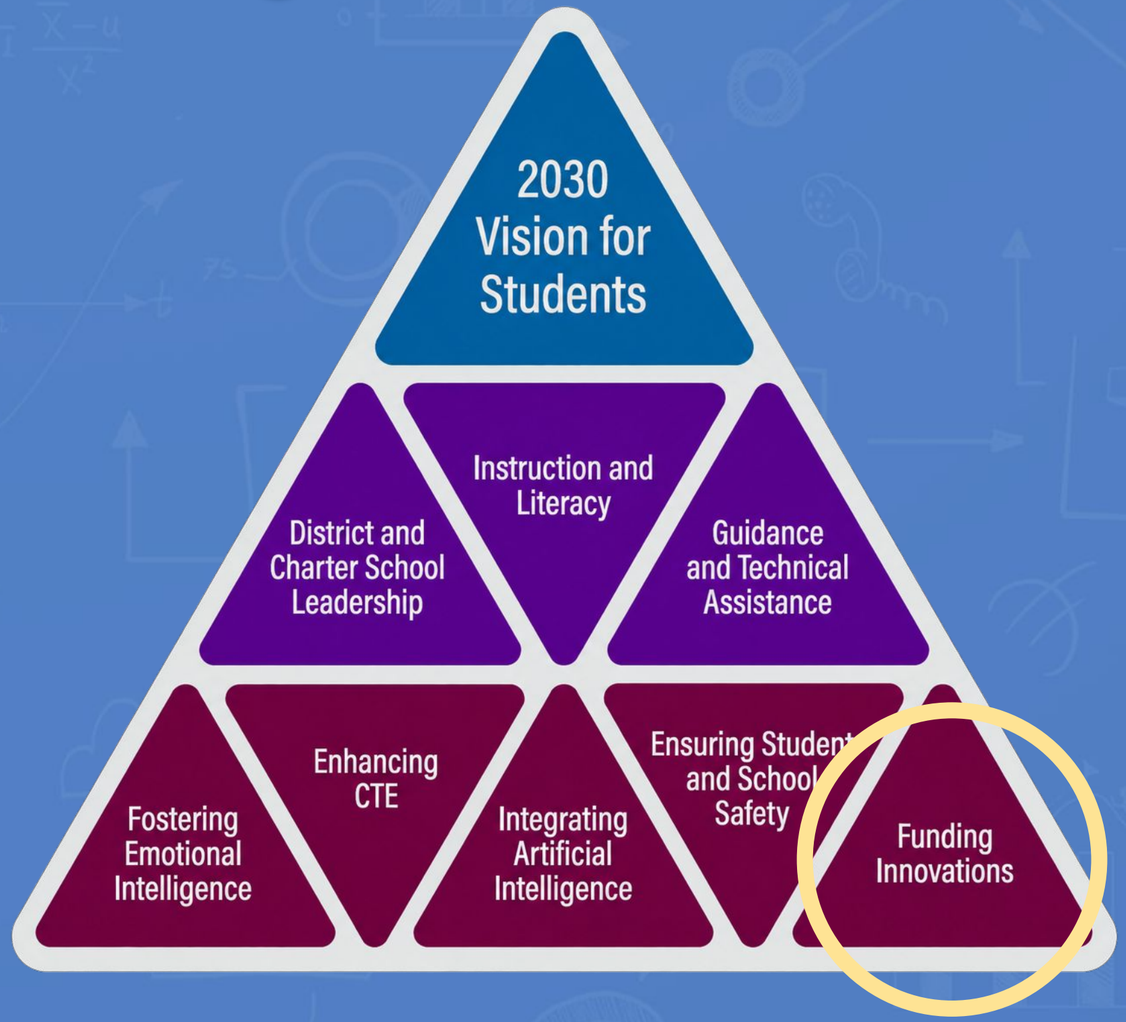


Orange County Department of Education

Background

Funding opportunity to support forward-thinking educational projects

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





Innovation Funding Initiative

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.



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



Logistics

RFA: See pages 3-4

Key dates, eligibility, funding available



Who is Eligible to Apply?

Applicants

- Orange County school districts serving students in grades TK-12

Cohort 1 funded districts are not eligible this round

Application Requirements

- Districts must apply with input from one or more school sites
- Districts may submit **up to two applications** but will receive no more than one award

Eligibility Restrictions

- Charter schools, private schools, School sites, LEAs outside of Orange County, colleges and universities, nonprofits or CBOs, and other non-LEA entities are not eligible to apply.

All Orange County TK-12 school districts are eligible to apply this round except: Anaheim Union, Fountain Valley SD, Fullerton SD, Huntington Beach Union, Orange USD, and Saddleback Valley USD. OCDE ACCESS is also not eligible to apply.



Awards Available

Number of Awards

6

New Districts Selected

Maximum Award Amount

$525,000

for 3-year project period
July 1, 2027 - June 30, 2030



Timeline: Due Dates, Program Dates

Activity	**Date** (all times shown are PST)
Request for Applications (RFA) Released	October 7, 2026
Prospective Applicant Webinars: Innovation Funding RFA Overview	October 13, 2026, 10:00 a.m. October 21, 2026, 2:00 p.m.
Deadline to submit Intent to Apply (optional)	October 30, 2026, 5:00 p.m.
Office Hours for Technical Questions	November 4, 2026, 2:00 p.m. November 13, 2026, 10:00 a.m. November 19, 2026, 10:00 a.m.
Deadline to submit questions	November 23, 2026, 5:00 p.m.
Final responses to questions (Frequently Asked Questions/FAQs) posted on OCDE website	November 24, 2026
Deadline to submit applications (Late or partial submissions will not be accepted)	December 4, 2026, 5:00 p.m.
Anticipated award announcement	Early February 2027
Period of Performance	July 1, 2027 - June 30, 2030



Intent to Apply

RFA: See pages 3 & 10

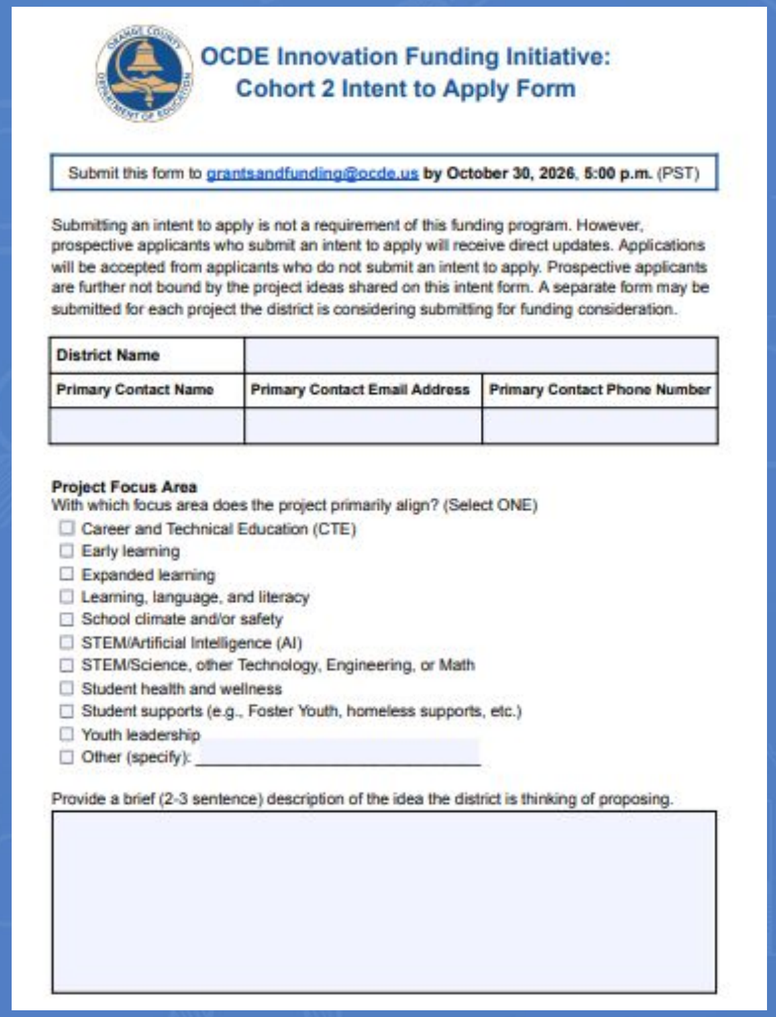




Intent to Apply Form

Submit by:
October 30, 2026, 5pm PST

- 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, if district plans to submit two projects
- Districts submitting an Intent to Apply Form will be added to listserv and receive direct updates



OCDE Innovation Funding Initiative: Cohort 2 Intent to Apply Form

Submit this form to grantsandfunding@ocde.us **by October 30, 2026, 5:00 p.m.** (PST)

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.

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

Project Focus Area
With which focus area does the project primarily align? (Select ONE)

- ☐ Career and Technical Education (CTE)
- ☐ Early learning
- ☐ Expanded learning
- ☐ Learning, language, and literacy
- ☐ School climate and/or safety
- ☐ STEM/Artificial Intelligence (AI)
- ☐ STEM/Science, other Technology, Engineering, or Math
- ☐ Student health and wellness
- ☐ Student supports (e.g., Foster Youth, homeless supports, etc.)
- ☐ Youth leadership
- ☐ Other (specify): _____

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



Application Components

RFA: See pages 6, 14-25



Sections of RFA

Table of Contents

I. Overview of the Program and Funding Opportunity	**2**
A. Purpose and Goals of OCDE Innovation Funding Opportunity	2
B. Overview of the Funding Opportunity	3
C. Support for Awardees and Learning Opportunities	5
D. Application Components and Applicant Agreements	6
E. Budget Guidelines	8
II. The Application	**10**
A. Application Process	10
B. Abstract Describing Innovation Project	14
C. Description of Project Narrative Sections	14
III. Application Materials	**25**
IV. Review and Selection Process	**26**
A. Application Scoring	26
B. Review Process and Funding Decisions	30
C. Appeals Process	30
V. Questions and Communication	**31**





Application Requirements

RFA: Page 6

All forms & templates on Website (How to Apply)

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





Application Checklist

Use this to confirm you have everything

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

Applications that do not adhere to formatting requirements may lose up to 2 points from their total score.

Cohort 2 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 completed checklist must be included with the application.

One Application File (in searchable PDF format) Containing:

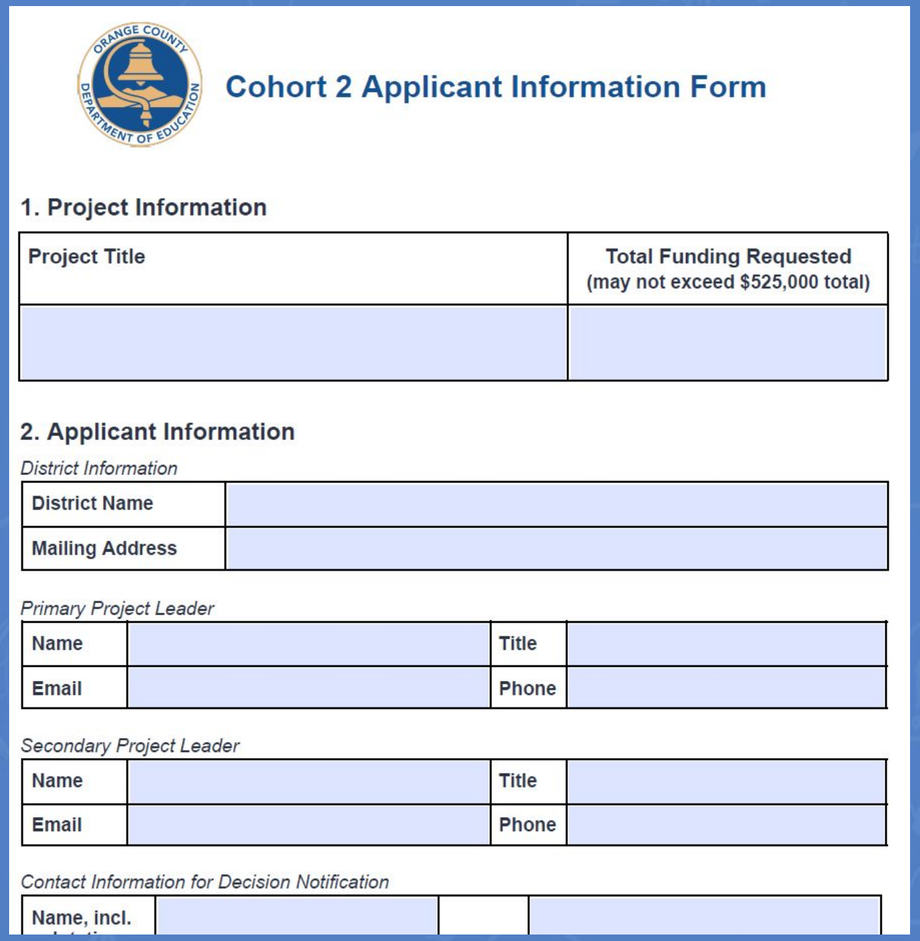
- ☐ Completed Application Checklist
- ☐ Applicant Information Form
- ☐ Applicant Agreements Form, with Acknowledgement of Authorization
- ☐ Project Abstract (1 page maximum, 12-point standard font, 1" margins, double-spaced)
- ☐ Project Narrative, with responses to all specified sections (20 page maximum, 12-point standard font, 1" margins, double-spaced)
- ☐ Budget Narrative (no page limit, 12-point standard font, 1" margins, double-spaced)
- ☐ Appendix (10 page maximum), with supplemental materials applicant that enhance their application, such as:
  - ☐ Metrics Table (required; may be in embedded within narrative or included in the Appendix)
  - ☐ Citations list (required, 12-point standard font, 1" margins, may be single-spaced)
  - ☐ Logic model, tables, or graphics supporting the narrative (optional)
  - ☐ Letters of Support (optional)

One Excel File Containing:

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



Applicant Information Form



Cohort 2 Applicant Information Form

1. Project Information

Project Title	Total Funding Requested (may not exceed $525,000 total)

2. Applicant Information

District Information

District Name	
Mailing Address	

Primary Project Leader

Name		Title	
Email		Phone	

Secondary Project Leader

Name		Title	
Email		Phone	

Contact Information for Decision Notification

Name, incl.			

- Project Title and Amount Requested
- Applicant Information
- Project Focus Area
- Primary Student Populations



Applicant Agreement Form

RFA: Page 7

- Awardee Orientation and Innovation Summit
- Coaching and learning community
- Evaluation, Data Collection, and Reporting
- Confirmation that OCDE was not involved in project design or application
- Compliance with local, state, and federal laws
- Authorization to Apply
  - Checkbox that superintendent is aware of nature of project as proposed



Cohort 2: 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 awardee orientation session (held within 2 months of contract award).
- ☐ Participate in the Orange County Education Innovation Summit (held in the spring annually).
- ☐ Comply with all local, state, and federal laws and educational code regulations in the use of innovation funding awarded under this program, and in implementing the project, contracting activities, data management, and other activities performed as part of this funding program.

Coaching and Learning Agreements

- ☐ Participate in biannual day-long coaching and learning sessions throughout the duration of the three-year project period, with district and/or school site project leads and key implementation staff and leaders attending each session.

Evaluation, Data Collection, Reporting, and Information Sharing Agreements

Awardees agree to:

- ☐ Submit quarterly fiscal expenditure reports to OCDE.
- ☐ Submit quarterly progress reports to OCDE.
- ☐ Submit annual evaluation reports to OCDE, including a final project evaluation report within 3 months of the project conclusion.
- ☐ Collaborate with an assigned OCDE Evaluator to develop a comprehensive evaluation plan, and to identify and/or revise metrics, establish data collection tools and processes for measuring project impacts, and develop strategies for monitoring progress towards programs goals.

Application Formatting

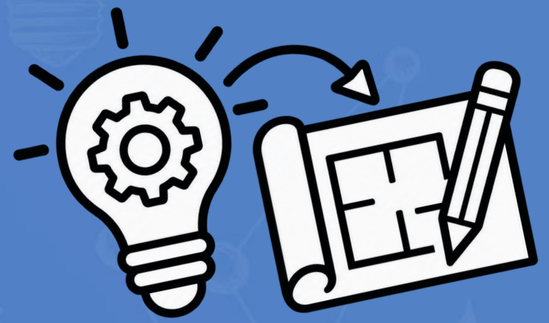
All sections of the application must adhere to the following formatting requirements, unless otherwise specified:

- Double-spaced, 12-point standard font, one inch (1") margins
- Pages numbered in Project Narrative and Budget Narrative sections
- Adhere to specified page limits
  - Responses that exceed page limits will not be reviewed beyond the maximum specified page limit. Applicant's full response may not be considered in scoring if it exceeds the page limit.

Applications that do not adhere to formatting requirements may lose up to 2 points from their total score.

- Minimize use of district name, district acronym, and school names throughout the application
  - Applicants may include the project title in a header or footer, but avoid including district or school identifying information in headers or footers.

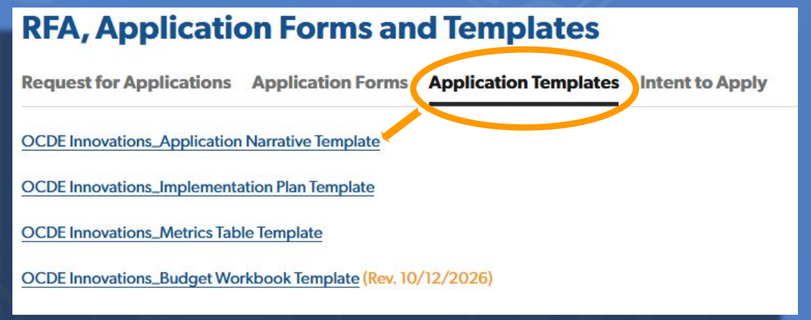




Project Narrative

(20 pages maximum)

RFA: Pages 14–23
download a copy of the Narrative Template



1. Project Abstract
2. Project Need and Alignment
3. Project Design and Quality, incl. Implementation Plan
4. Feasibility of Project
5. Evaluation Planning, incl. metrics table
6. Strategies for Sustaining and Scaling the Innovation



Project Abstract

RFA: Page 14

- Single, stand-alone page, double spaced, 12 point standard font, 1" margins
- Required, but not scored
- Briefly describe innovation project and project title
- Need or challenge the project addresses
- Main project goals and expected impacts/outcomes
- Main strategies to be implemented
- What makes project innovative, and whether it is a *new* innovation for the district *or expansion* of an existing innovation
- If space allows: other relevant information that communicates what the proposed project entails, partners involved in the project, etc.



Project Narrative:
Project Need and Alignment

RFA: Pages 15-16

- Identify the need or challenge faced by students or schools the project will address (with evidence), and how the project will address the need
  - Include description of what is already being done to address the need
- Specify target population(s)
  - Must address a Differentiated Assistance (DA) eligibility indicator or student group
- Introduce the innovation, and whether it is a new innovation or expansion of existing innovation
  - relevant theory or preliminary evidence guiding the innovation, and alignment with relevant standards
- Describe how the proposed project align with district or school priorities & OCDE's 5-3-1 Plan



Project Narrative:
Project Design and Quality

RFA: Pages 16-18

- Description of the project, proposed strategies and activities
- What makes the project innovative, if not described in Need section
- Project's goals and objectives
  - Target date, measurable action, population or setting, intended impact
    - Example: By June 30, 2029, test an intergenerational reading program with all 1st grade EL students in the district in order to improve reading literacy.
- Implementation site(s) and target population(s) participating
  - Grade levels, student groups prioritized, #s to be served
  - How staff will be selected to participate



Project Narrative:
Project Design and Quality (cont.)

RFA: Page 18

- Goals* state outcomes hoping to achieve
- Objectives specify measurable results that mark progress toward goals
- Activities describe actions or tasks that will help achieve each objective

*Goal wording will match exactly with wording in Metrics Table

[Name of Project] Implementation Plan

See description and example in the *Project Design and Quality* section of the Request for Applications for guidance on creating the implementation plan. Applicants may include as many objectives and activities as needed for each goal to give the reviewer an idea of the applicant's plan for implementation, timing and measuring progress.

Goal 1:			
Objective	Activities	Timeline (Dates)	Progress Indicators
Goal 2:			
Objective	Activities	Timeline	Progress Indicators
Goal 3:			
Objective	Activities	Timeline	Progress Indicators

- Cover entire 3 year project period
- Use template as is, or adapt if needed



Project Narrative:
Project Feasibility

RFA: Page 18-20

- Applicant's capacity and readiness to implement proposed project
  - Capacity to collaborate with OCDE Evaluator and Implementation Coaches, to collect and analyze data, complete reporting and evaluation tasks, and engage in learning opportunities
- Key district and school site personnel or positions involved, and expertise, roles and responsibilities of each
  - Will new staff be hired or new roles created that need to be filled (*consider planning period in first year*)
  - Plan for staff turnover in project leadership and/or key implementation staff
- School leadership involvement in developing the project and/or in application process
- Completion of Readiness/Feasibility table (RFA p. 20)



Project Narrative:

RFA: Page 20

Project Feasibility: Readiness/Feasibility Table

Based on National Implementation Research Network's (NIRN) Hexagon Tool

Readiness/Feasibility for Project Implementation (based On Hexagon Tool)		
Indicator	*Rating*	*Describe Factors Contributing to Readiness Rating*
Implementation Site Indicator: Capacity to Implement		
Implementation Site Indicator: Fit with Current Initiatives		
Program Indicator: Supports		
Describe the actions needed to optimize readiness and develop staff capacity:		



Project Narrative:
Evaluation Planning

RFA: Page 21-22

- Describe how success will be measured
- Complete Metrics Table
  - Measures that will be used to monitor progress (process measures) and to evaluate impacts of project (outcome measures)
- Awardees will work with OCDE Evaluator to develop and implement a rigorous evaluation of the project



Project Narrative:
Evaluation Planning (cont.)

RFA: Page 22

Goal [#]*:		
Measure	Outcome or Process Measure?	Student Outcome?
	Outcome	Yes
	Outcome	No
	Process	No
	Choose an Option	Choose an Option
Goal [#]:		
	Choose an Option	Choose an Option
	Choose an Option	Choose an Option
	Choose an Option	Choose an Option
Goal [#]:		
	Choose an Option	Choose an

- Use Metrics Table template as is
- Goals must be worded exactly as in Implementation table
- Measures must be aligned with goals and objectives from Project Design section
- Must include at least one student outcome measure, tied to a DA indicator or student group
- Encouraged to include short and long-term outcomes



Project Narrative:
Sustaining & Scaling

RFA: Page 23

Sustainability

- Initial plan for sustaining the project (e.g., continued funding, potential partnerships, staff or resources to sustain innovation after project funding ends)
  - Include specific examples of what district will do to sustain innovation and its impacts

Scaling

- Initial plan for scaling the project, during the project period or after the project funding ends
  - How it will be scaled within the district
  - Specific strategies for sharing experiences and project results, and how they will support/guide other partners in adapting or adopting the innovation



Budget Workbook

Budget Template:

- 3-year budget
- Categories
- Brief description of expenses

Orange County Department of Education

Cohort 2 Innovation Funding

BUDGET

Funding Term: July 1, 2027 through June 30, 2030

STEFAN BEAN, Ed.D.
County Superintendent of Schools

OCDE Grants & Funding Use ONLY
Date _____
☐ Approved
☐ Needs Revision

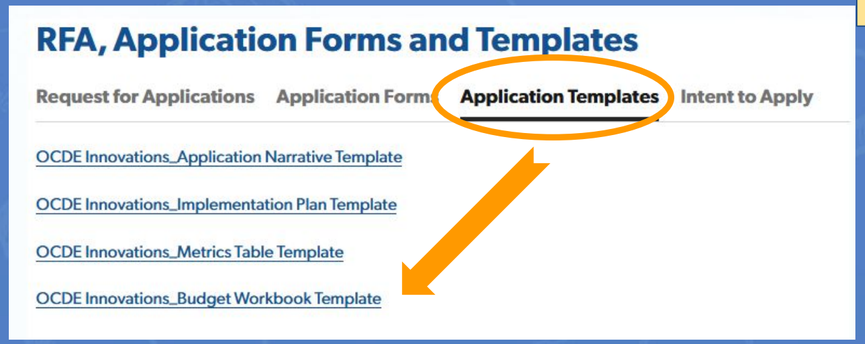
School District Name:	Date:

Budget Summary

CATEGORY	Year 1 Budget July 1, 2027 - June 30, 2028	Year 2 Budget July 1, 2028 - June 30, 2029	Year 3 Budget July 1, 2029 - June 30, 2030	Total	Brief Explanation for Use of Funds:
	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				-	Enter state approved rate:
7000 Indirect Costs [*Max allowed is Applicant district's state approved rate;* Enter state approved rate in Brief Explanation column]				-	
Budget Subtotal (excluding Indirect Costs)	-	-	-	-	
Total Budget (including Indirect Costs)	-	-	-	-	

Primary Project Lead Name	Title	Phone Number	Email Address

Fiscal Services Contact Name	Title	Phone Number	Email Address



RFA: pages 8-9, 24-25, and guidance in Project/ Budget Narrative Template and in Budget workbook



Allowable vs. Unallowable Costs

(Not exhaustive list- see pg. 8-9 of RFA)

- 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



(Need OCDE approval and provide clear description why necessary)

- 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.



Budget Workbook: Common Mistakes

- Applying the indirect cost rate to the wrong base
- Using a rate other than the district's current approved rate
- Not including indirect costs in the maximum grant amount
- Not dividing expenses between project years in a way that makes sense with your proposal
- Assuming salaries and benefits will remain constant over all three years

Access more detailed information on common budget workbook mistakes and solutions, on our Resources page.

Innovation Funding Initiative





Budget Narrative

BUDGET CATEGORIES

1000s	Certificated Salaries
2000s	Classified Salaries
3000s	Benefits
4000s	Books & Supplies
5000s	Services/Other Operating Expenditures
6000s	Capital Outlay
7000s	Indirect Costs

- Detailed description of expenses (include dollar amounts), organized by budget category
- Justify why each cost is reasonable and necessary to achieve project objectives
- Align proposed expenses to project components and implementation plan
- Explain strategies that will support non-staff expenses (e.g., technology, equipment)
- If leveraged funding or in-kind staff or support is needed to implement the project, applicant must describe that. If not, applicant must state that Innovation Funding will cover all project expenses.
- No page limit



Budget Narrative: Examples

Problem	Weak Description	Stronger Description
Vague description for 1000s *Certificated* salaries	"Teacher to support the project: $55,636"	Year 1–3: $55,636 total for one teacher project lead at 0.20 FTE. Calculation: $90,000 annual salary × 0.20 FTE = $18,000 per year plus a 3% cost of living increase annually. The lead will co-design the student check-in routine, train participating teachers, and review implementation data during scheduled release time. The position supports the teacher training and implementation activities described in the project plan."
Vague description for 4000s Books and Supplies	"Supplies and materials for students" $6,400"	"Year 1: $3,840 for student check-in journals and printed attendance-planning materials for 120 participating students. Calculation: 120 student sets × $32 per set. Year 2: $1,280 for replacement and new-student sets (40 × $32). Year 3: $1,280 for replacement and new-student sets (40 × $32). Materials will be used during the scheduled check-ins and attendance-planning activities. Quantities reflect projected student participation."

Access more examples on our Resources page



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)
- Other supplemental materials the applicant believes will enhance their application
- RFA: See page 11



Submission Process

RFA: See pages 12-14



Process

Submit by:
December 4, 2026 5pm PST

Email → **Email Attachments**

Submit to:
grantsandfunding@ocde.us

Subject Line:
"Cohort 2 Innovation Funding Application: [District Name - Brief Project Title]"

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

[District Abbreviation]_Budget:
- Budget Workbook

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

*Single application file in searchable PDF format (see RFA p. 13 for more information)



Other Helpful Tips

- To avoid losing points, review formatting and page limit requirements (they are repeated in multiple places)
- 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



Scoring

RFA: See pages 26-29



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:

Review & Scoring Round: blind review; 3 independent reviewers for each redacted application

Selection Round: Top scoring applications; summary, scores and reviewer notes reviewed by selection panel; projects selected based on balance of district types and project focus areas



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 and detailed goals, objectives, & implementation plan (timeline)
4. Key personnel, roles, & responsibilities
   * School site leadership involved in design of project and application
5. Measures of progress and 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



Supports Available

RFA: See pages 5-6



During the Application Process

- **Questions**: may be submitted in writing **by 11/23/26** to grantsandfunding@ocde.us
- **FAQs on Website** (check regularly; updated weekly)
- **Webinars**
  October 13, 10:00-11:00 a.m. & October 21, 2-3 pm
- **Office Hours**:
  November 4 (2-3 pm), November 13 (10-11 am), and November 19 (10-11 am)
- **Website**: Innovation Funding Initiative Website
- **Sign up for** listserv (updates emailed)
  - If you submit intent to apply, you will be added to the listserv



During Implementation

Support from Implementation Coach and Innovation Evaluator



- 1:1 coaching/technical assistance, group support
- Support with:
  - Developing metrics, data collection, and rigorous evaluation plan
  - Implementation monitoring, thought partnership, as needed
  - Fiscal and evaluation reporting



Learning Community



Reporting & Evaluation



- Quarterly Progress and Fiscal Reports
- Annual Evaluation Reports
- End of Project Evaluation Report



Slide deck will be posted on OCDE Innovation Funding website on the Resources page



grantsandfunding@ocde.us