

**U.S. Department of Education - EDCAPS
G5-Technical Review Form (New)**

Status: Submitted

Last Updated: 06/15/2018 11:31 AM

Technical Review Coversheet

Applicant: Charlotte Lab School, Inc. (U282E180014)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	15	12
Quality of Project Design		
1. Project Design	30	25
Quality of Project Personnel		
1. Project Personnel	10	8
Quality of the Management Plan		
1. Management Plan	10	4
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Continuation Plan		
1. Continuation Plan	15	10
Sub Total	100	74
Priority Questions		
Competitive Preference Priority 1		
Access to High-Quality Educational Choice		
1. Increasing Access	2	2
Sub Total	2	2
Competitive Preference Priority 2		
Dual or Concurrent Enrollment Programs		
1. Enrollment Programs	2	2
Sub Total	2	2
Total	104	78

Technical Review Form

Panel #2 - CSP Developers (84.282E) - 2: 84.282E

Reader #1: *****

Applicant: Charlotte Lab School, Inc. (U282E180014)

Questions

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The significance of the contribution the proposed project will make in expanding educational Opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary considers the quality of the plan to ensure that the charter school the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students and serve those students at rates comparable to surrounding public schools.**

Strengths:

School demonstrates commitment to "intentional diversity", with an approved state-waiver request to ensure 40% enrollment comes from economically disadvantaged families based on qualification for Free and Reduced Lunch (e17, e29). School increased enrollment for economically disadvantaged students from 17% in 2016-17 to 25% in 2017-18, and school plans to continue this trend to 30% in 2018-19 (e57). School pulls from a lottery pool of over 1000 applicants each year, demonstrating that the school is serving a need in the community (e17). Marketing materials are made available in both English and Spanish, and school hosts Saturday Open Houses/Information Sessions to accommodate family schedules (e58). School provides a letter with details related to the State Board of Education Waiver to allow priority enrollment for economically disadvantaged students (e189).

School plans to utilize grant funds to support admissions, marketing, and communications to recruit a diverse student body (e29), expanding program to serve grades K-12. School will add 420 seats in grades 9-12 at full capacity. School will host parent information nights and a speaker series with food and childcare provided, to promote the school (e29). School plans to use grant funds to provide training and curriculum development on themes of diversity, equity, and inclusion (e29).

Weaknesses:

Demographics are provided for the community, but not for the student population enrolled at the school (e58). Enrollment totals and trends for the K-8 program are not provided. Without this information, it is difficult to determine the success of the program and its impact on the community.

Reader's Score: 12

Selection Criteria - Quality of Project Design

- 1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the following factors:**

Reader's Score: 25

Sub Question

- 1. (1) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable**

Strengths:

School outlines the goals and measurable objectives intended to be accomplished through the project (e28). Broad goals are given, such as "Intentional Diversity" and "Global Readiness", with measurable objectives provided for each goal ("100% of students will demonstrate progress in the Intercultural Competency Framework, as indicated through class assignments, extracurricular activities, service and internship opportunities, or independent studies" (e28).

School provides a detailed Marketing Plan (e59), which outlines the timeline for marketing activities from Winter 2019 to Fall 2020.

Logic Model (e63) provides overall details, activities, outcomes, and impact for plans related to school expansion. Model assigns responsible leaders for each area and short-term, mid-term, and long-term benefits.

Weaknesses:

Some areas of planning do not appear to be developed, such as construction or expansion of facility, purchase of equipment and supplies, and timelines for hiring and training new staff members.

School plan includes two planning years before new students are added to the program (e201). Application would have been stronger with a clearer link between project activities, budget categories, and timelines.

Reader's Score: 10

- 2. (2) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs**

Strengths:

School is based on the successful NYC iSchool (e76).

School provides a variety of supports designed to meet the needs of the target population, including personalized learning through online digital courses, individualized student scheduling, Passion Project requirement for all juniors and seniors based on their individual areas of interest and talents, and interdisciplinary "quests" based on real-world challenges (e45-e48).

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

- 1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers:**

Reader's Score: 8

Sub Question

1. **(1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability**

Strengths:

School's commitment to providing educational access to Spanish and Mandarin-speaking families implies a commitment to hiring diverse staff members who can provide this support (e17). School plans for marketing are intended to "ensure of diverse pool of students and faculty applicants" (e29).

Weaknesses:

No demographic information is provided for staff. The information provided did not fully address this selection criteria.

Reader's Score: 0

2. **(2) The qualifications, including relevant training and experience, of key project personnel**

Strengths:

Director is highly qualified for position, with experience and training appropriate to charter schools and the specific mission of this school. She was a founder of NYC iSchool (e76), on which this school is based. She holds a Doctor of Education in Public School Leadership and has authored a book on school leadership (e76). Resumes for additional key personnel demonstrate a variety of backgrounds appropriate to the job duties assigned, many advanced degrees, and experience with the school since its opening in 2015 (e76-e87).

School provides an organizational chart for the Instructional Leadership Team, outlining the roles, responsibilities, and areas of expertise for each key staff members (e176e178). For example, the Head of Lower School is given responsibility for overseeing the Lower School (LS) Leadership Team, the LS Wellness Team, the K-6 Math Team, and the LS Enrichment Team (e176).

Weaknesses:

Organizational chart does not address duties related to the program expansion.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan

1. **The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.**

Strengths:

Budget calls for majority expenses to be applied to start-up personnel costs (salaries and benefits) and one-time equipment costs to support the expansion to grades 9-12 (e7). Grant narrative describes major activities and use of funds for years 1-5 (e28-e30), including rationale for marketing plan and staffing plan.

Weaknesses:

Data is not provided in sufficient detail to determine if timelines and budget goals will be met. Specific personnel responsible for many major activities are not identified.

Selection Criteria - Quality of the Eligible Applicant

1. The extent to which the applicant demonstrates that the charter school to be replicated or expanded is a high-quality charter school, including:

(1) The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, attending the charter schools the applicant operates or manages. These subgroups of students include: Economically disadvantaged students, students from major racial and ethnic groups, children with disabilities, and students who are ELs.

(2) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available, student academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.

(3) The extent to which charter schools operated or managed by the applicant have been closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have had any significant issues in the area of financial or operational management; have experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have had any significant issues with respect to student safety.

Strengths:

School curriculum is aligned with state standards and includes additional criteria required for graduation, and requires a personalized learning platform for every student (e41). School provides assessment data for 2015-16 and 2016-17, the two years since the school opened (e120-e122). Students have outperformed local district and state assessment results for all students, as well as for most subgroups on the state end-of-grade tests. For the two subgroups that did not yet outperform the local district, school provides a comprehensive plan to improve academic achievement specifically for Hispanic and Economically Disadvantaged Students (e65, e119). School indicates progress is being made, as measured on NWEA MAP assessment and Fountas and Pinnell reading assessments (e65, e120-e121).

School was rated as "met" for all measures on the 2016-17 Performance Framework (e190-e194), with two exceptions. School was cited for a concern related to admissions and lottery requirements, which has been addressed per a letter from the Office of Charter Schools (e66, e??, e97). School was cited for failure to meet or exceed growth expectations for Hispanic Subgroup, American Indian Subgroup, and Economically Disadvantaged Subgroup (e65-e67).

FY2017 Audit is clean with no significant areas of concern (e168).

Weaknesses:

Assessment results indicate the school is not yet proficient in addressing the academic needs of its Hispanic and economically disadvantaged students (e65-e67). Chart on page e119 with assessments results is extremely hard to read. Because the school demographics have not been provided, it is difficult to know the impact of the lower academic achievement for the Hispanic and Economically Disadvantaged subgroups.

Selection Criteria - Continuation Plan

1. The extent to which the eligible applicant is prepared to continue to operate charter schools that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under

this program are no longer available.

Strengths:

School plans to use grant funds to support the initial costs required to establish a well-developed high school program and curricula (e33). Requested expenditures include one-time costs as the program is implemented, such as furniture, website design, and architectural services (e34). School expects the high school to be fully enrolled at 400 students and self-sustaining by the 4th year of operations (e34).

School has a record of successfully soliciting donations for the program, with more than 75% of families making a donation and raising more than \$1.8M from all sources in the past three years (e35). School provides 14 letters from community members in support of the school, from such sources as the Urban Education Collaborative, Public Schools of North Carolina, University of Pennsylvania, and Charter School Growth Fund (e89-e104).

Weaknesses:

School needs to ensure full compliance with authorizer requirements and earn “meets expectations” on annual Performance Framework. Without a clear and detailed management plan, it is difficult to determine if the school will be able to successfully complete the goals of this project on time and within budget.

Reader's Score: 10

Priority Questions

Competitive Preference Priority 1 - Access to High-Quality Educational Choice

1. Competitive Preference Priority 1—Supporting High-Need Students by Increasing Access to High-Quality Educational Choice

This priority is for projects that are designed to increase access to educational choice and improve academic outcomes and learning environments for one or more of the following groups of students:

- (i) Students in communities served by rural local educational agencies**
- (ii) Children with disabilities**
- (iii) English learners**
- (iv) Students who are members of federally recognized Indian Tribes.**

Note: Applicants may choose to respond to one or more of the priority areas and are not required to respond to each priority area in order to receive the maximum available points under this competitive preference priority.

Strengths:

School provides an inclusion setting for students with disabilities (SWD). School demonstrates a commitment to increased enrollment of students with disabilities, and has increased enrollment of SWD from 4.3% in 2015-16 to 8.5% in 2016-17 (e21). Students with disabilities at the school outperformed local district SWD by 15.1% in Spring 2017 assessments (e21). School provides for the physical learning environment of SWD with flexible seating options, hands-on learning opportunities, and special education support services (e21-e22, e60-e62).

School was commended by the authorizer for “ensuring that referrals received were processed in a timely manner” and received a score of 100.0% for 2015-16 and 2016-17 on the Indicator 11: Federal Target/Child Find report (e195-e196).

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 2 - Dual or Concurrent Enrollment Programs

1. Competitive Preference Priority 2—Dual or Concurrent Enrollment Programs and Early College High Schools

The extent to which the proposed project is designed to increase student access to, participation in, and completion of dual or concurrent enrollment programs or early college high schools.

Strengths:

School plans to provide access to online digital learning options that will allow students to meet high school credit requirements while earning college credit (e22). Each student will be required to take one or more college level courses related to their Passion Project (e22-e23). School has developed relationships with several colleges that will partner with them to provide opportunities for students (e22). School will develop an advisory course, where students will be provided support in small-group settings to develop academic, social, and behavioral skills (e31, e52-e53).

Weaknesses:

No weaknesses noted.

Reader's Score: 2

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Last Updated: 06/15/2018 11:31 AM

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Technical Review Coversheet

Applicant: Charlotte Lab School, Inc. (U282E180014)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	15	13
Quality of Project Design		
1. Project Design	30	26
Quality of Project Personnel		
1. Project Personnel	10	8
Quality of the Management Plan		
1. Management Plan	10	4
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Continuation Plan		
1. Continuation Plan	15	10
Sub Total	100	76
Priority Questions		
Competitive Preference Priority 1		
Access to High-Quality Educational Choice		
1. Increasing Access	2	2
Sub Total	2	2
Competitive Preference Priority 2		
Dual or Concurrent Enrollment Programs		
1. Enrollment Programs	2	2
Sub Total	2	2
Total	104	80

Technical Review Form

Panel #2 - CSP Developers (84.282E) - 2: 84.282E

Reader #2: *****

Applicant: Charlotte Lab School, Inc. (U282E180014)

Questions

Selection Criteria - Assisting Educationally Disadvantaged Students

1. **The significance of the contribution the proposed project will make in expanding educational Opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary considers the quality of the plan to ensure that the charter school the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students and serve those students at rates comparable to surrounding public schools.**

Strengths:

The applicant notes a number of strategies designed to recruit and enroll educationally disadvantaged students at rates comparable to surrounding schools, including adopting a weighted lottery process (p. e 27) that is reflective of surrounding Mecklenburg County demographics (p. e189) as well as setting a target of 40% economically disadvantaged students (p. e28) in order to provide enrollment targets consistent with the larger area; promotion activities designed to increase the overall diversity of the school (p. e29); creating a network of community partners to assist high school students to obtain real-world experiences (p. e30); creating a summer bridge program to pay teachers to provide additional instructional time to for students below grade level in reading and math (p. e31); the use of transportation strategies such as carpooling, school buses, and the use of the local transit system to assist parents and students with transportation needs (p. e38); and other instructional strategies such as a personalized learning platform, Passion Projects, online learning experiences, individualized scheduling, and career development strategies (p. e 41-48).

Weaknesses:

The applicant was noted as being non-compliant in the 2017 charter performance framework (dated in a letter April 13, 2018) in item A6 – student admissions and lottery requirements (p. e191). This notification was after the school had received permission to conduct the weighted lottery in a letter dated January 18, 2017 (p. e189). Demographics provided are reflective of the county, not the school (p. e189) so it is difficult to make comparisons between the school and the surrounding area.

Reader's Score: 13

Selection Criteria - Quality of Project Design

1. **The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the following factors:**

Reader's Score: 26

Sub Question

1. **(1) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable**

Sub Question

Strengths:

The applicant used a logic model (p. e63) identify activities, outputs, and outcomes related to the project design. Broad goals are listed (Intentional Diversity, College Readiness, Career Readiness, Global Readiness, Student Wellness, Community Involvement) the activities listed are further described in the narrative on pages e34-62. The outcomes are measurable and identifiable in that the outcome measures are linked to numbers of students (student population, credit accumulation, career readiness measures, student progress in the Intercultural Competency Framework, score on the Mindset assessment), or community members (measure of educational programming).

Weaknesses:

Activities listed on p. e63 lack specificity unless linked to the narrative in the application. Outputs are not measurable as listed and lack specificity in their meaning (i.e. "enrollment rate, diversity rate, job placement, job readiness") which makes it difficult to link them directly to the outcomes described.

Reader's Score: 11

2. (2) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs

Strengths:

The target population is defined by the applicant as the additional students in the expanded grades 9-12 (p. e17) and the applicant describes high school student-specific activities including the development of personalized learning plans, schedules, and areas for deep research labeled Passion Projects (p. e41-43); supports for college readiness including supports in mathematics that prepare students for dual credit and AP math courses, state testing and the SAT (p. e44-45); self-paced online learning using K-12, Edgeunity, Khan Academy, Connections Academy, as well as IHE courses (p. e46); and emotional/behavioral supports including advisory activities and restorative practices and discipline procedures (p. e52-54).

Weaknesses:

No weaknesses are noted in the applicant's response.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers:

Reader's Score: 8

Sub Question

1. (1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability

Strengths:

The applicant includes some references to a diverse student population and staff on pages e17 and e29.

Sub Question

Weaknesses:

Although the applicant mentioned some aspects of providing a diverse staff (p. e17 and p. e29), there is insufficient evidence to determine the ability of the applicant to encourage applications from diverse populations

Reader's Score: 0

2. (2) The qualifications, including relevant training and experience, of key project personnel

Strengths:

The project personnel as noted in resumes on pages e76-87 possess a wide range of abilities and experiences that are consistent with the broad scope of the project including personnel with experience in curriculum and instruction, marketing, student literacy, students with disabilities, and operations/finance.

Weaknesses:

Because the logic plan (p. e63) and the budget narrative (p. e201-202) provide broad definitions of personnel responsibilities instead of specific individuals, it is difficult to determine with accuracy which personnel are ultimately responsible for specific portions of the plan.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan

- 1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.**

Strengths:

The budget narrative (p. e201), combined with the logic narrative (p. e63) identify general timelines, personnel responsibilities, and milestones for achievement in regards to a management plan.

Weaknesses:

Staff responsible for the completion of grant activities are not clearly defined but rather listed as "marketing team", administrative team", "curriculum developer", "internship coordinator" (p. e63. Grant funds listed in the budget narrative on pages e201-202 are listed by year with general descriptions of the activity, and the assumption that the grant activities listed will be completed during that project year. Budgeting seems imprecise in that the requested \$1,250,000 in grant funds are divided equally in increments of \$250,000 in years one through five, indicative of the general, not specific, nature of the funding request.

Reader's Score: 4

Selection Criteria - Quality of the Eligible Applicant

- 1. The extent to which the applicant demonstrates that the charter school to be replicated or expanded is a high-quality charter school, including:**

(1) The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, attending the charter schools the applicant operates or manages. These subgroups of students include: Economically disadvantaged students, students from major racial and ethnic groups, children with disabilities, and students who are ELs.

(2) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available, student academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.

(3) The extent to which charter schools operated or managed by the applicant have been closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have had any significant issues in the area of financial or operational management; have experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have had any significant issues with respect to student safety.

Strengths:

The applicant presents data that compares CLS performance to all students in the state of North Carolina for 2016-17 indicating that overall achievement indicators in End of Grade (EOG) reading show 83% proficiency, 70% in Math, and 79% in Science (p. e197), equating to "B" performance in all areas and a score of "B" in reading growth and "C" in math growth. Attendance percentages exceed the state average, as do students who have level 4 "sufficient" command in reading, math, and science, and "superior" command (level 5) in reading and in math as compared to the state (p. e 198). The school has a higher percentage of students promoted to grade 4 (95% to 85.6%) when compared to the state (p. e199) and a smaller number of short and long-term suspensions when compared to the state (p. e199). The school met standard for many measures on the 2016-17 performance framework (p. e193) including the performance composite GLP and CCR, and identified groups including female, male, black, white, and exceptional student groups. The applicant states on page e73-74 that information for compliance and management issues have been submitted to the US Department of Education.

Weaknesses:

The applicant did not meet academic outcome measures for the Hispanic, American Indian, and Economically Disadvantaged subgroups in the 2016-17 charter performance report (p. e193). The school was not compliant in the conduct of the lottery (Item A6, p. e191). Because the school only reports one year of data, it is difficult to determine the strength of the comparisons between the school and the state and determine any long-term trends.

Reader's Score: 15

Selection Criteria - Continuation Plan

- 1. The extent to which the eligible applicant is prepared to continue to operate charter schools that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under this program are no longer available.**

Strengths:

The applicant notes that the high school will be fully enrolled after year four (p. e34) and concludes that after that time the per pupil revenue generated from the expanded enrollment will provide sufficient revenue to continue grant activities.

Weaknesses:

Because of the imprecise nature of the logic model (p. e63) in defining responsibilities of management team members as well as the imprecise nature of the budget narrative (p. e201-202), it is difficult to determine with certainty the likelihood that grant activities will continue after the project period has ended.

Reader's Score: 10

Priority Questions

Competitive Preference Priority 1 - Access to High-Quality Educational Choice

1. Competitive Preference Priority 1—Supporting High-Need Students by Increasing Access to High-Quality Educational Choice

This priority is for projects that are designed to increase access to educational choice and improve academic outcomes and learning environments for one or more of the following groups of students:

- (i) Students in communities served by rural local educational agencies
- (ii) Children with disabilities
- (iii) English learners
- (iv) Students who are members of federally recognized Indian Tribes.

Note: Applicants may choose to respond to one or more of the priority areas and are not required to respond to each priority area in order to receive the maximum available points under this competitive preference priority.

Strengths:

The applicant notes that in regards to improving outcomes and learning environments for children with disabilities, students with disabilities (SWD) achieved at a proficiency rate 15.1 % higher than the local district (p. e21) and that the SWD population has increased from 4.3% to 8.5% with 12.7 of students with an IEP or a 504 plan (p. e21). Data from the state indicates that the federal Child Find indicator of referral and placement within 90 days was achieved for 100% of students (p. e195) and that for the state performance framework that 34.5% of the exceptional children subgroup students achieved grade level proficiency, which scored a “met indicator” in the framework (p. e194). The applicant notes accommodations for SWD children including participation in project-based learning activities and the provision of a physical environment that allows students to participate in learning activities while considering space and movement needs (p. e21-22).

Weaknesses:

No weaknesses are noted in the applicant's response.

Reader's Score: 2

Competitive Preference Priority 2 - Dual or Concurrent Enrollment Programs

1. Competitive Preference Priority 2—Dual or Concurrent Enrollment Programs and Early College High Schools

The extent to which the proposed project is designed to increase student access to, participation in, and completion of dual or concurrent enrollment programs or early college high schools.

Strengths:

The applicant notes an expectation of 100% participation for students to participate in a concurrent enrollment opportunity (p. e23). To achieve this, the applicant will provide online and distance learning opportunities for dual credit, as well as a requirement for all student to take an appropriate college level course relevant to their Passion Project (p. e22). The applicant lists 5 IHEs with existing partnerships with a goal of expanding to early college partnerships with these institutions (p. e22). Fundraising efforts will be initiated by the school to assist with the affordability of these partnerships (p. e23).

Weaknesses:

No weaknesses are noted in the applicant's response.

Reader's Score: 2

Status: Submitted

Last Updated: 06/20/2018 07:29 AM

Status: Submitted

Last Updated: 06/16/2018 02:30 PM

Technical Review Coversheet

Applicant: Charlotte Lab School, Inc. (U282E180014)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	15	13
Quality of Project Design		
1. Project Design	30	26
Quality of Project Personnel		
1. Project Personnel	10	8
Quality of the Management Plan		
1. Management Plan	10	3
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Continuation Plan		
1. Continuation Plan	15	9
Sub Total	100	74
Priority Questions		
Competitive Preference Priority 1		
Access to High-Quality Educational Choice		
1. Increasing Access	2	2
Sub Total	2	2
Competitive Preference Priority 2		
Dual or Concurrent Enrollment Programs		
1. Enrollment Programs	2	2
Sub Total	2	2
Total	104	78

Technical Review Form

Panel #2 - CSP Developers (84.282E) - 2: 84.282E

Reader #3: *****

Applicant: Charlotte Lab School, Inc. (U282E180014)

Questions

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The significance of the contribution the proposed project will make in expanding educational Opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary considers the quality of the plan to ensure that the charter school the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students and serve those students at rates comparable to surrounding public schools.**

Strengths:

CLS went through a process to adopt a state-approved waiver to utilize a weighted lottery to increase socioeconomic diversity by giving admissions priority to students qualifying for free and reduced lunch (e27, e29, Appendix I). Through soliciting input and responding to parent feedback, CLS was able to move forward and implement this school initiative to increase diversity (e27). In expanding the high school, CLS will have events for prospective parents, community members, and community partners to get their feedback and enlist their support in providing community-based, real-world learning opportunities for students (e27-28).

CLS set a goal to reach a population of 40% educationally disadvantaged (ED) students to match demographics of the community and district in which its located. CLS reached its year 1 goal of increasing enrollment of ED students from 17% to 25%, and is positioned to increase to 30% in the 2018-19 school year and reach 40% within the next two years (e57-58).

CLS continues to work toward having a student population reflective of Mecklenburg County and the district (e58).

CLS is located in Mecklenburg County, one of the most racially segregated districts in the state. Many schools (60/160) are hyper-segregated, with 10% or fewer white students attending (e28). CLS wants to prove that integration is not only possible, but beneficial to all students. Grant expenditures will support the Admissions, Recruitment, Marketing, and Communications teams by temporarily subsidizing salaries, providing trainings and professional development on diversity, equity, and inclusion, and funding resources and activities needed to advertise and recruit a diverse student body (e29).

CLS deliberately chose a location in Center City Charlotte to attract a diverse student body and to be within walking distance of public transportation options for students who wish to attend from outer parts of the city (e38). During CLS' three years of operation, the school has provided a transportation survey to all families to be responsive to their needs and ensure that no child is denied access to CLS due to lack of transportation (e38). CLS uses a mix of carpools, public transit, and school buses to accommodate students (e38-39).

CLS has a marketing and enrollment plan, including materials in both English and Spanish, open houses, and information sessions held in both languages. They also include a detailed marketing plan and timeline showing the activities they will engage in each season leading up to the high school launch in fall 2020 (e58).

Weaknesses:

The application does not present CLS' student demographics or subgroup enrollment percentages apart from the growing percentage of ED students. Apart from providing assurance that CLS continues to work toward having a student population reflective of Mecklenburg County and the district (e58), we are not provided information on the school's demographics to make these comparisons or conclusions ourselves. (The application does provide county and district

demographics on e189, just not the school's own data.)

Reader's Score: 13

Selection Criteria - Quality of Project Design

- 1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the following factors:**

Reader's Score: 26

Sub Question

- 1. (1) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable**

Strengths:

CLS has six goals for its high school expansion, along with aligned activities and expenditures that indicate investments in staff, professional development, curriculum, and facilities (e28). Each of the project's six goals contains appropriately scoped, measurable objectives with quantitative indicators to measure progress (e28).

The logic model (e63) details the resources, needs, activities, outputs, outcomes, and impact of the project design. The activities are aligned with the six project goals (intentional diversity, college readiness, career readiness, global readiness, student wellness, and community involvement) and the outcomes are measurable. These goals are described at length in the narrative on pgs. e40-55.

The budget narrative also alludes to the project design. At a high level, CLS High School will open in fall 2020 with 100 students in 9th grade and will expand by one grade level each year – reaching full capacity of 420 by year 4 (e201). The budget narrative includes broad details on the nature of expenditures for each of the five requested years that aligns with what's presented in the application narrative (e201).

Weaknesses:

The budget narrative description of expenditures is very high level and lacks detail. Total requested amounts per year are presented, but no detail on budget categories or amounts spent on personnel vs. equipment vs. curriculum is presented (e202).

While the project goals and objectives are specified and measurable, they do not “cross-walk” to budget requests in a clear way, apart from the aggregate budget requests per year (e201-202).

The outputs included in the logic model (e63) are not measurable and are not clearly aligned to the goals and objectives. The application would be strengthened if the narrative and logic model were better aligned to begin with. There is a gap between the two and it's not clear how the project goals discussed in the narrative will play out as outlined in the logic model.

The applicant is requesting some funds for construction and expansion of facilities and hiring and training staff (see budget request on page e201) but the plan for this work is not scoped or discussed in the application narrative or appendices.

Reader's Score: 11

Sub Question

- 2. (2) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs**

Strengths:

CLS is looking to expand innovative practices and partnerships into a program that serves high schoolers, creating a full K-12 continuum that not only prepares student academically, but also gives them the tools to shape their minds and well-being (e24).

The application shows that the CLS instructional model is purposefully driven by the CLS vision, and that the two are aligned. The core components of the model are intentional diversity, college readiness, career readiness, global readiness, community involvement, and student wellness (e40). These components of the model are evident in the instructional framework and in practices like individualized scheduling, Passion Projects, Core Experiences, Quest courses, and requiring a foreign language, which are discussed in detail on pages e40-e55.

CLS recognizes its role as a “lab school” in modeling new ways for community members to be involved in public schools and to create an expanded classroom that is a part of the community to broaden students’ perspectives of what’s possible and expose them to diverse people and careers (e31).

CLS planned the following key expenditures to help students gain confidence and access needed for upward economic mobility: investments in personnel (including a college counselor), professional development, arts and music programs, resource and curriculum development, instructional materials, personalized learning platforms, a whole school retreat, travel for innovative school visits, a summer bridge program for incoming students, small school size, and stipends for personalized learning opportunities for teachers (e30-33). And in year 5, funding will partially fund an internship coordinator and teacher training wherein staff will prepare PDs based on their own experiences teaching in the greater Charlotte community “expanded campus”. The goal is for the school not only to use the community for learning, but for the community to see the school as a place for them to learn as well (e30).

The goal of the above investments are to create a well-developed high school program and curricula, create a foundation for a positive school culture, ensure that CLS has well-prepared, trained, and supported staff, allow CLS to develop a program with long-lasting impact on student success in college, career and personal wellness, and to show what’s possible for community engagement and integration (e34).

Weaknesses:

No weaknesses identified.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

- 1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers:**

Reader's Score: 8

Sub Question

- 1. (1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability**

Sub Question

Strengths:

No strengths identified.

Weaknesses:

The cursory amount of information provided (on e17, e29) did not sufficiently address this criteria or provide enough information to assess the extent to which the applicant actually encourages applications from underrepresented groups.

Reader's Score: 0

2. (2) The qualifications, including relevant training and experience, of key project personnel

Strengths:

Resumes are included for 5 key project personnel – the Executive Director, Assistant Dir. of Development, Head of External Affairs, Exceptional Children’s Director, and Head of Operations (Appendix B, beginning on e75). The backgrounds and experiences of these staff members are impressive and together they possess a wide variety of skills relevant to running a school and a non-profit and consistent with the broad scope of the project.

CLS includes an organizational chart for 2017-18 in Appendix I (e176) that provides a detailed overview of each person’s role and responsibilities.

Weaknesses:

Apart from the resumes and organizational chart, no information is provided on the roles and responsibilities of project personnel specific to the CSP project (i.e. duties related to the expansion). The reviewer is left to assume that the five individuals whose resumes were provided in the appendix are the key project personnel.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.

Strengths:

A timeline for CLS High School’s marketing and recruitment plan is included (e59), but this only addresses one piece of the overall management of the project.

Weaknesses:

No concrete management plan is provided nor is this criteria directly addressed in the application. Instead, the reviewer is forced to piece disparate elements of the application together to try and assess how the school will manage this project. No timelines or milestones for project management are provided apart from the marketing plan timeline (e59).

The staff responsible for completion of the project are not individually identified in the application. We are provided with four resumes in Appendix B (beginning on e76) but their specific roles in project management are not mentioned in the application.

The grant funds in the budget narrative (e201-202) are listed by year along very general descriptions of how funds will be used. Their description lacks specificity. It appears imprecise that each year the budget request is the same (\$250,000 per

year) and that there is no front-loading of expenses or years with different budget needs.

Reader's Score: 3

Selection Criteria - Quality of the Eligible Applicant

1. The extent to which the applicant demonstrates that the charter school to be replicated or expanded is a high-quality charter school, including:

(1) The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, attending the charter schools the applicant operates or manages. These subgroups of students include: Economically disadvantaged students, students from major racial and ethnic groups, children with disabilities, and students who are ELs.

(2) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available, student academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.

(3) The extent to which charter schools operated or managed by the applicant have been closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have had any significant issues in the area of financial or operational management; have experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have had any significant issues with respect to student safety.

Strengths:

CLS earned a B as a School Performance Grade on the North Carolina Report Card in both 2015-16 and 2016-17 (e25). On its 2016-17 state report card, CLS had fewer suspensions than the state average (e199).

CLS has a comprehensive plan to engage parents, families, and the broader community in setting the foundation for CLS High School and also for continuous involvement (e35-37). CLS' plan for community engagement is especially robust and tied directly to the instructional model centered on real-world learning (e37).

CLS has high student retention. Rates for the two most recent school years were 94% and 89%, and 94% report that they will return for the 2018-19 school year (e39). Average attendance rate over last two years was high at 95.5%, and higher than the state average (e66).

In Appendix E, CLS included assessment results for each subgroup for the first two years of CLS' operation and a comparison of results with those of the local district, Charlotte Mecklenburg Schools. Results show that CLS is significantly outperforming the local district and the state on state assessments in reading, math, and science and is also outperforming for various subgroups (e64). Specifically, Asian, Black, and Multiracial students at CLS performs better than the local districts' subgroups and students with disabilities perform significantly higher than the local district (e64-65).

The applicant acknowledges needed improvements to raise performance of Hispanic and Economically Disadvantaged students (e65). While state assessment results are not where they need to be, both groups have demonstrated growth on NWEA MAP and in reading levels as measured through Fountas & Pinnell (e65, Appendix E).

Student growth has also been measured in students' social-emotional and 21st century skill development on the Mindsets, Essential Skills and Habits (MESH) Survey that measures growth in non-cognitive areas and assesses student and school culture. According to MESH results (Appendix E), CLS outperforms other schools in the national cohort in all areas of the survey, indicating strong school culture and effective social-emotional learning practices and programs (e65). Students, teachers, and parents also report student growth in many 21st century skills like collaboration, student agency,

self-advocacy, etc. (e66).

CLS' most recent audit in 2016-17 had no findings of non-compliance or material weakness (e64, Appendix F e164). In most areas of the 2016-17 Performance Framework including finance, governance, safety, academics, and operations (except for those noted in weaknesses below), CLS was found in compliance (e67).

Weaknesses:

The application included a performance spreadsheet in the appendix, but it was largely unreadable due to very small print (e119). As a result, the reviewer largely needs to take the applicant at their word when they describe student performance on pages e64-66.

CLS Hispanic and Educationally Disadvantaged students underperform relative to the district and state. The school is implementing several initiatives to address these gaps, including improved PD, tutoring, enrichment, and extra instructional time to provide remediation, hiring interventionists (e65).

In its 2016-17 Performance Framework (Appendix I), weaknesses were noted in five key areas: student admissions and lottery requirements (e66), meeting or exceeding expected growth, Hispanic subgroup grade level proficiency, American Indian subgroup grade level proficiency, and Economically Disadvantaged student grade level proficiency (e67, e191-193). The applicant cannot fully assess the extent of these issues or how much of the student population they affect because we are not provided with subgroup enrollment/demographic data apart from the population of EDs.

On its North Carolina 2016-17 School Report Card, CLS received a growth status of "not met" (e197).

Reader's Score: 15

Selection Criteria - Continuation Plan

- 1. The extent to which the eligible applicant is prepared to continue to operate charter schools that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under this program are no longer available.**

Strengths:

CLS leaders understand and take seriously the importance of being economically self-sufficient. CSP grant fund investments in furniture, supplies, web design, grant management assistance, architectural services, operations, leadership, and fundraising support encompass one-time start-up costs. The high school expects to be fully enrolled by the end of year 4 (400+ students) and per pupil funding will suffice for majority of operating costs (e34).

Any minimal deficits in the annual operating budget leading up to and including year 4 will be compensated by an annual fundraising campaign, the Lab Innovation Fund, which already has an established track record (e34). Gifts to this fund are unrestricted and invested according to school priorities. This year CLS is on track to raise \$275,000 and since its first year of operation, CLS has raised more than \$1.8 million from all sources in the past three years and more than 75% of families have supported the school by making a donation (e35).

Fourteen letters of support are included with the application (Appendix C, beginning on e88), including from Charter School Growth Fund, the district Director of the Office of Charter Schools, CLS parents, and the NC Superintendent of Instruction.

Weaknesses:

Without a true management plan (see criteria #4) to assess as a form of accountability for project implementation and continuation, there is a significant weakness in this criteria despite assurances of financial sustainability.

Priority Questions

Competitive Preference Priority 1 - Access to High-Quality Educational Choice

1. Competitive Preference Priority 1—Supporting High-Need Students by Increasing Access to High-Quality Educational Choice

This priority is for projects that are designed to increase access to educational choice and improve academic outcomes and learning environments for one or more of the following groups of students:

- (i) Students in communities served by rural local educational agencies
- (ii) Children with disabilities
- (iii) English learners
- (iv) Students who are members of federally recognized Indian Tribes.

Note: Applicants may choose to respond to one or more of the priority areas and are not required to respond to each priority area in order to receive the maximum available points under this competitive preference priority.

Strengths:

CLS provides students with disabilities (SWDs) access to a high-quality education in an inclusive setting and performs better than the local school district on end-of-grade testing (e21). The school employs a co-teaching model and are taught in an instructional setting that provides the Least Restrictive Environment (e60). In Spring 2017, SWD at CLS achieved a proficiency rate that was 15.1% higher than the district (e21, Appendix E).

CLS' marketing is committed to recruiting, enrolling, and retaining SWDs. Since 2015-16, the school has increased its SWD population from 4.3% to 8.5% and 12.7% of their students have IEPs or 504s (e21).

SWDs at CLS participate in project-based and real world learning opportunities and does not exclude them from "authentic, learning-by-doing experiences" that are a part of all students' schedules each day (e21).

CLS has intentionally designed a physical learning environment that does not exclude SWDs, with flexible classrooms that allow students to sit on carpet and move tables and chairs into different configurations. CLS also has different seating options for students who may be in need of more movement and others who have sensory issues and prefer close spaces (e21-22), so that all students can find spaces that allow them to focus.

Weaknesses:

No weaknesses identified.

Competitive Preference Priority 2 - Dual or Concurrent Enrollment Programs

1. Competitive Preference Priority 2—Dual or Concurrent Enrollment Programs and Early College High Schools

The extent to which the proposed project is designed to increase student access to, participation in, and completion of dual or concurrent enrollment programs or early college high schools.

Strengths:

In its 9-12 expansion, CLS will support and enable concurrent enrollment in high school and college-level courses through formal and informal partnerships (e22). The application provides evidence that concurrent enrollment is a core part of their

instructional model.

Juniors and seniors at CLS will complete a "Passion Project", for which they'll be required to take a college-level course. Students will be able to enroll in online and distance-learning courses through accredited institutions in order to meet this requirement (e22).

CLS has existing relationships and partnerships with UNC Charlotte's Center City campus, Queen's University, Northeastern, Davidson College, and Central Piedmont Community College. In their planning year for this expansion, CLS will explore formal early college partnerships and programs with these institutions and will work to ensure that these partnerships are economically feasible for all students (e22-23).

It will be the expectation that 100% of CLS high schoolers participate in concurrent enrollment based on specific learning needs and their Passion Project (e23).

Weaknesses:

No weaknesses identified.

Reader's Score: 2

Status: Submitted
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