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

#### Selection Criteria

**Significance of the proposed project**
- 1. Significance
  - Points Possible: 35
  - Points Scored: 32

**Quality of Project Design**
- 1. Project Design
  - Points Possible: 30
  - Points Scored: 30

**Quality of Management Plan/adequacy of resources**
- 1. Management Plan/Resources
  - Points Possible: 15
  - Points Scored: 7

**Quality of Project Personnel**
- 1. Project Personnel
  - Points Possible: 10
  - Points Scored: 9

**Quality of the Project Evaluation**
- 1. Project Evaluation
  - Points Possible: 10
  - Points Scored: 10

**Sub Total**
- Points Possible: 100
- Points Scored: 88

#### Priority Questions

**Competitive Preference Priority**

**Empowering Families/Individuals**
- 1. Families/Individuals
  - Points Possible: 5
  - Points Scored: 4

**Sub Total**
- Points Possible: 5
- Points Scored: 4

**Total**
- Points Possible: 105
- Points Scored: 92
Questions

Selection Criteria - Significance of the proposed project

1. The Secretary considers the significance of the proposed project. In determining the significance of the proposed project, the Secretary considers the following factors (up to 35 points):

   (1) The potential for generalizing from the findings or results of the proposed project;

   (2) The extent to which the results of the proposed project are to be disseminated in ways that will enable others to use the information or strategies;

   (3) The likelihood that the proposed project will result in system change or improvement; and

   (4) The extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.

Strengths:

The applicant provided a robust discussion of the obstacles charter schools face specific to access to facilities, such as the scarcity of instructional space, lack of access to per-pupil facility allocations, lack of access to local bonds and levies, and the need to use operational funds to support facilities (pgs. e24-e25). The applicant has a proven track record of supporting charter school leaders in being disciplined and strategic in accessing facilities (pg. e25).

A major goal of the CSU-Expansion project is to analyze and collect information on the most pressing facilities needs of charter schools (pg. e25) via the support hotline, consultations, and website, and use these findings to adjust resources and services to charter schools in general (pg. e26). Dissemination of these generalized findings will primarily be on the CSU-Expansion website (pg. e26). However, information will also be disseminated at state and national charter school conferences, in written publications, through case studies of charter schools served by CSU-Expansion, via webinars with national and state associations and authorizers, in training materials, and an analysis of the charter support hotline findings (pgs. e26-e27).

Building Hope has provided direct services and support to a large number of charter schools leading to improvement for those schools and their communities (pgs. e19, e29). In addition, it has created opportunities for over 88,609 predominantly low-income, minority students to receive a quality education (pg. e19).

Weaknesses:

Building Hope stated it has supported over 50 charter schools in Washington D.C. with its proven method yet indicates Washington D.C. is an area that still faces significant facility challenges (pgs. e27-e28) and intends to focus on this area for the CSU-Expansion project. As such, it is not clear if the proposed project is likely to result in system change or build local capacity.

Reader's Score: 32
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 (up to 30 points):

1. The extent to which the proposed project demonstrates a rationale (as defined in 34 CFR 77.1(c));
2. The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable;
3. The extent to which the proposed project represents an exceptional approach to the priority or priorities established for the competition; and
4. The mechanisms the applicant will use to broadly disseminate information on its project so as to support further development or replication.

Strengths:

Building Hope proposes one objective for the CSU-Expansion project: to replicate their successful Florida Charter School Unit (FCSU) model and demonstrate that intensively providing services to charter schools can improve their access to facilities and facility financing and empower families and individuals to choose a high-quality education (pgs. e30-e31). Based on the proven track record provided in the application, along with a discussion of the challenges charter schools face with access to facilities across the nation, it appears there is a rationale for this project (pgs. e29-e40).

Short- and long-term outcomes of the proposed CSU-Expansion project are clearly specified and measurable (pg. e30).

The proposed CSU-Expansion project has the potential to save charter schools millions of dollars, hundreds of hours of time researching facility and facility financing options, and provide best practices to numerous governing boards that do not receive direct services via the webpage (pgs. e19, e21, and e26). If successful, the CSU-Expansion project would be a replicable model that could expand to additional states (pg. e30). The creation of a Charter School Hotline is an exceptional approach.

Weaknesses:

No weaknesses found.

Reader's Score: 30

Selection Criteria - Quality of Management Plan/adequacy of resources

1. The Secretary considers the quality of the management plan and adequacy of resources for the proposed project. In determining the quality of the management plan and adequacy of resources for the proposed project, the Secretary considers the following factors (up to 15 points):

1. 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;
2. The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project; and
3. The relevance and demonstrated commitment of each partner in the proposed project to the implementation and success of the project.

Strengths:

It appears the costs are reasonable in relation to the proposed project (pg. e184). It also appears that the charter school association in Washington D.C. (pg. e71), two charter schools in New York (pgs. e73 and e75), and additional entities (pgs. e69, e72, and e74) are committed to the proposed project.
Building hope indicated it would establish specific goals, objectives, and timelines for each party involved in the CSU-Expansion project that would be reviewed by senior management quarterly to ensure the project is proceeding as planned and has sufficient corporate resources any unforeseen issues (pg. e40). However, the applicant did not include clearly defined responsibilities, timelines, or milestones for accomplishing the project activities identified on pg. e30. Some assumptions regarding responsibilities can be made using the budget narrative (pg. e184).

The lack of specificity in the budget narrative (pg. e184) makes it challenging to verify if it matches the amounts on the budget summary (pg. e6).

In addition, it is not clear if any entities in Texas, one of the three proposed focus states, is committed to the proposed project.

Reader's Score: 7

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 the following factors (up to 10 points):

   (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;

   (2) The qualifications, including relevant training and experience, of the project director or principal investigator; and

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

Strengths:

The application indicates Building Hope commits to seeking qualified individuals of diverse backgrounds (pgs. e12 and e43) and the current leadership team and members of the Board of Directors support the likelihood the applicant would be able to employ persons who are members of groups that have traditionally been underrepresented.

The qualifications of Building Hope’s staff, most of whom have worked with the company for 5 – 10 years (pg. e42), are extensive. The project director, Mr. Fuller, has relevant and substantial experience with the FCSU project (pg. e44). The three regional managers, Mr. Porter, Ms. Fortune, and Mr. Damico, and the support team, Mr. McCormack, Mr. Warn, and Mr. Whetzel, all have relevant training and experience (pgs. e44-e48).

Weaknesses:

Limited documentation in appendix A supporting statement that current leadership team and board of directors are actively engaged in organizations that champion underrepresented groups.

Reader's Score: 9

Selection Criteria - Quality of the Project Evaluation

1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project and will produce quantitative and qualitative data to the extent possible (up to 10 points).
Strengths:
The proposed project evaluation includes (1) reports on schedule and time spent on activities and the measurement of results, (2) a dashboard with project metrics as defined in the logic model, (3) qualitative and quantitative data on schools served and resources accessed and distributed, (4) project costs, (5) individual performance objectives and reviews, (6) performance reports, and (7) final report (pgs. e49-e50).

Weaknesses:
No weaknesses found.

Reader’s Score: 10

Priority Questions

Competitive Preference Priority - Empowering Families/Individuals

1. Competitive Preference Priority—Empowering Families and Individuals To Choose a High-Quality Education That Meets Their Unique Needs (Up to 5 points)

Projects that are designed to address increasing access to educational choice for one or more of the following groups of children or students:

(i) Children or students with disabilities.
(ii) English learners.
(iii) Students who are Indians, as defined in section 6151 of the ESEA.
(iv) Children or students in communities served by rural local educational agencies.

Strengths:
Building Hope proposes to use funds from this grant to ensure the programs and services provided by the Charter Support Unit Expansion (CSU-Expansion) create greater opportunities for students with disabilities, English language learners, and students in communities served by rural local education agencies (pg. e23). Specifically, their proposed project will provide support to at least 100 rural charter schools across multiple states (pg. e30) and help school leaders navigate the instructional challenges in serving students with disabilities and ELL students (pg. e24).

Weaknesses:
Limited supporting documentation was provided specific to the need or number of student populations of (a) students with disabilities, (b) English learners, and (c) students in communities served by rural education agencies, as well as the need or number of charter schools struggling with facility needs, in the three target states (i.e., New York, Washington D.C., and Texas) (pg. e21).

Reader’s Score: 4

Status: Submitted
Last Updated: 08/20/2018 12:43 PM
Technical Review Coversheet

**Applicant:** Building Hope... A Charter School Facilities Fund (U282T180017)
**Reader #2:** **********

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**Priority Questions**

**Competitive Preference Priority**

**Empowering Families/Individuals**

| 1. Families/Individuals        | 5               | 4             |
| **Sub Total**                  | 5               | 4             |

**Total**

| 105                           | 94              |
Questions

Selection Criteria - Significance of the proposed project

1. The Secretary considers the significance of the proposed project. In determining the significance of the proposed project, the Secretary considers the following factors (up to 35 points):

   (1) The potential for generalizing from the findings or results of the proposed project;

   (2) The extent to which the results of the proposed project are to be disseminated in ways that will enable others to use the information or strategies;

   (3) The likelihood that the proposed project will result in system change or improvement; and

   (4) The extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.

Strengths:

The introduction to this section provides the rationale for this proposal. The applicant summarizes the major obstacles for charter schools in securing facilities and facilities funding, and especially those in rural areas. With their proven track record, and with this proposal, they will support more charter leaders (3 states and rural charter schools) in more cost-effectively maneuvering real-estate, and provide a replicable model for other states and entities to consider.

The applicant will analyze and collect data from the support hotline, one on one consultations and website usage, to then provide recommendations on the most pressing facility needs. Pages E25-26

The applicant has been providing assistance to charters for 15 years, and are familiar with barriers that exist. The applicant will also use the collected data to evaluate their programming to adjust resources and services accordingly. Pages e25-26

The website will be the primary vehicle for disseminating the results of the proposed project. A marketing strategy is proposed to drive stakeholders both in the target markets and a broader audience, as anyone can access the website. Dissemination about the website and its products includes presentations at national conferences, publications, case studies, webinars, training manuals preparation. Presenting an analysis of the charter support hotline findings.

The applicant cites the continued funding the Florida legislature allocated to the FCSU which was based on the compelling data collected in the initial years of FCSU’s existence. The applicant believes that the data collected in the CSU Expansion will result in better informed state legislators, authorizers and advocates, as the existing FCSU model is replicated in the 3 additional states. They also cite that Building Hope has provided assistance to 50 charter schools in the DC area to date. Although the applicant does not provide specific data on “system improvement” in this section, but it is included on page e19, that they provided $305 million in investments to 245 schools, and leveraged over $1.36 billion in charter school construction, and created “seats” for over 88,609 students. This is a significant indication that this factor will be met with the CSU Expansion.

The applicant proposes a two year start up grant with this proposal, but is confident, and has a proven track record of continued funding after grant sources end. Page E29

The initial FCSU assisted 175 schools over the past 6 years, with 35 percent of those schools being with their first charter contract year.
Weaknesses:
The applicant did not include how building local capacity in the 3 new states would address the needs of the target populations in those states. It would have been informative to understand the specific demographics of the three states and how the proposal would address these demographics and or differentiate based on the demographics.

Reader’s Score: 34

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 (up to 30 points):

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   (2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable;
   (3) The extent to which the proposed project represents an exceptional approach to the priority or priorities established for the competition; and
   (4) The mechanisms the applicant will use to broadly disseminate information on its project so as to support further development or replication.

Strengths:
The rationale was addressed above on page e25 in the introduction to section 1. The applicant also refers to their 15 years of experience connecting charter schools to facilities support and services thus enabling families and individual to choose high quality education. This grant proposal would continue that tradition.

The Logic Model is provided as an overview of inputs, resources, activities and timeline, outputs and outcomes. The amount request for this proposal is incorrect in the Logic Model. Page E30

Measurable project objectives and measurable outcomes are clearly stated on pages e31-33. The Logic Model further details the breadth and detail of the proposal.

The applicant provides further detail on the major activities of the proposal on pages e33-37. It is apparent that the quality of the activities proposed is a direct result of the 15 year experience of the applicant providing technical assistance to charter schools throughout the US, as well as the most recent implementation of the FCSU center, which is proposed to be replicated with this proposal. This appears to be a thorough, vetted and exceptional approach to building charter school leader’s capacity to access facilities and facilities financing by connecting them with resources, experts in the field, and all free of cost. Although the proposal targets three states, all of the activities and resources are available to anyone who is interested.

The applicant presents clear mechanisms for disseminating information on the project. One of their intentions is to replicate an existing successful model, and then to disseminate information about this project so that other states and entities will consider replication.

Weaknesses:
No weaknesses were found in this section.
Selection Criteria - Quality of Management Plan/adequacy of resources

1. The Secretary considers the quality of the management plan and adequacy of resources for the proposed project. In determining the quality of the management plan and adequacy of resources for the proposed project, the Secretary considers the following factors (up to 15 points):

   (1) 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;

   (2) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project; and

   (3) The relevance and demonstrated commitment of each partner in the proposed project to the implementation and success of the project.

Strengths:
The budget narrative appears to be reasonable in relation to the objectives of the proposed project. The applicant indicates the costs are based on the FCSU’s operating budget and so should be realistic. Page E184 Additionally, Building Hope will provide additional office staff ad resources for greater efficiencies. Page E41

Letters of support are referenced here from two national non profit organizations serving charter schools. Additionally, three letters of support are provided by three charter schools receiving support from Building Hope, two in New York, one of the targeted states. There are some additional letters that are significant though not mentioned in this section: Florida House of Representatives Michael Bileca, and Seton Education Partners, a charter management organization in New York. Although not mentioned here, it is significant that the applicant funded and support the FCSU for the year it was not funded by the legislature, a significant indication of their commitment to the success of this proposal. (age E20

Weaknesses:
A specific management plan is not provided in this section. The applicant indicates that a management plan is developed for all of their initiatives, including the FCSU. Page E40. As such, this is the expectation if this proposal is selected for funding.

There are no letters of support indicating Texas’ level of commitment to this project.

The job description for the full time Hot Line Call personnel does not seem to justify the expense of a full time person. The Florida Unit average number of calls and the projected average number of calls for the three state unit, do not support the line item personnel expenditure.

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 the following factors (up to 10 points):

   (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;

   (2) The qualifications, including relevant training and experience, of the project director or principal investigator; and

   (3) The qualifications, including relevant training and experience, of key project personnel.
Strengths:
Although 1 full time staff is proposed to be hired with this proposal, it is notable that Building Hope provides extensive expertise through their 30 person team.

The project director from the Florida CSU will take over the CSU Expansion. He appears to be uniquely qualified for this position.

The key project personnel appear to be highly qualified and significant members of the team.

Weaknesses:
It is not clear how the applicant will encourage applications for employment from persons who are members of groups that have traditionally been underrepresented.

Selection Criteria - Quality of the Project Evaluation

1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project and will produce quantitative and qualitative data to the extent possible (up to 10 points).

   Strengths:
The applicant’s staff will provide the evaluation of the project. They have a proven track record of this for other projects including FCSU, and will use those same proven tools with this new endeavor. The appendices includes detailed metrics on all aspects from the original center, FCSU, indicating the detail that can be expected with the evaluation of this proposal if funded.

   Weaknesses:
No weaknesses were found with this section.

Priority Questions

Competitive Preference Priority - Empowering Families/Individuals

1. Competitive Preference Priority--Empowering Families and Individuals To Choose a High-Quality Education That Meets Their Unique Needs (Up to 5 points)

   Projects that are designed to address increasing access to educational choice for one or more of the following groups of children or students:

   (i) Children or students with disabilities.
   (ii) English learners.
   (iii) Students who are Indians, as defined in section 6151 of the ESEA.
   (iv) Children or students in communities served by rural local educational agencies.
Strengths:
The applicant describes their mission as ensuring that every child have access to a high-quality K-12 education. They acknowledge that many barriers exist for students to gain access to educational choices. They acknowledge that rural communities are more challenged to provide quality education choices to students with disabilities, ELL and students. That is one of the reasons this application targets providing assistance specifically to rural charter schools. Building Hope is an experienced technical assistance provider for the past 15 years, providing opportunities for over 88,609 students, predominantly low-income, minority students. Page E19 and 21.

Weaknesses:
The applicant did not provide information on the demographics of the states they are targeting in this grant. As such, it was unclear which of the groups included in the Competitive Preference Priority will be addressed by this proposal. in this Competitive Preference Priority.

Reader's Score: 4
Technical Review Coversheet

Applicant: Building Hope... A Charter School Facilities Fund (U282T180017)

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**Priority Questions**

Competitive Preference Priority

Empowering Families/Individuals

1. Families/Individuals

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**Total** 105 91
Technical Review Form

Panel #1 - 84.282T-AP 2 - 1: 84.282T

Reader #1: **********
Applicant: Building Hope... A Charter School Facilities Fund (U282T180017)

Questions

Selection Criteria - Significance of the proposed project

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   (3) The likelihood that the proposed project will result in system change or improvement; and

   (4) The extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.

Strengths:

Applicants make the case for why access to facilities is an obstacle for charter, especially in rural areas (e24). The organization will help to support charter leaders and provide a model for other states. The hotline, one-on-one consultations, and the website are effective mechanisms for dissemination of information to charters (e25). Building Hope has demonstrated the capacity to provide, improve, and expand services with the Florida project (e29).

Weaknesses:

Having a website is useful, but there is not enough detail about how the website be utilized. For example, the website could be planned as an interactive website or as more of an online bulletin (e26). The data collection will highlight issues facing charters but this will not necessarily result in system change or improvement (e28).

Reader’s Score: 32

Selection Criteria - Quality of Project Design

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   (4) The mechanisms the applicant will use to broadly disseminate information on its project so as to support further development or replication.

Strengths:

The applicants will replicate a successful model currently implemented in FL (e29). The rationale supports long term goals that are clearly outlined in the Logic Model (e30). Building Hope will utilize innovative strategies such as the help hotline, one-on-one consultations, and the webinar series (e34) which is already being implemented in FL (e37).
The goals, objectives, and outcomes are measurable but not as clearly specified as possible (e32). Again, more detailed explanation is needed regarding the expected outcomes for the website creation, i.e. website traffic vs actual downloads of materials.

Reader's Score: 29

Selection Criteria - Quality of Management Plan/adequacy of resources

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   (2) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project; and

   (3) The relevance and demonstrated commitment of each partner in the proposed project to the implementation and success of the project.

Strengths:

The budget narrative provides more detailed information on how funds will be spent (e184). The costs seem reasonable and the applicants also mention securing additional funds, if necessary. External partners have provided letters of support indicating their commitment to the successful implementation of this grant

Weaknesses:

It is not clear why the applicants need to hire a full-time person to field the hotline calls. In the FL project, there were only 2.35 contacts per week (e34); there needs to be more explanation as to what the individual will do when there are no calls. The project management roles are not specified. Texas did not provide a letter of support

Reader's Score: 9

Selection Criteria - Quality of Project Personnel

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

Strengths:

Diversity recruitment efforts seem realistic and relevant; the applicants utilize the networks of their current employees who are members of the underrepresented groups (e43). Both the Project Director and Principal Investigator have strong experience and familiarity with charter schools (e43-e48).
Weaknesses:
Building Hope refers to the diverse make-up of their partner organizations being in Appendix A but I did not find this information in the application (e43).

Reader's Score: 9

Selection Criteria - Quality of the Project Evaluation

1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project and will produce quantitative and qualitative data to the extent possible (up to 10 points).

Strengths:
The dashboard with metrics will be reviewed quarterly to measure progress towards the goals and objectives of the project (e49). Additionally, data related to performance reviews will be considered during the overall evaluation process (e49).

Weaknesses:
An example of the dashboard and the possible metrics should be included in the project evaluation section. Also, intended outcomes should be listed along with specific performance measures. The applicants mention that the team will track qualitative and quantitative data but no specified plan was included (e49).

Reader's Score: 8

Priority Questions

Competitive Preference Priority - Empowering Families/Individuals

1. Competitive Preference Priority—Empowering Families and Individuals To Choose a High-Quality Education That Meets Their Unique Needs (Up to 5 points)

Projects that are designed to address increasing access to educational choice for one or more of the following groups of children or students:

(i) Children or students with disabilities.
(ii) English learners.
(iii) Students who are Indians, as defined in section 6151 of the ESEA.
(iv) Children or students in communities served by rural local educational agencies.

Strengths:
It addresses students with disabilities and ELLs in two sections, Barrier 1 and Barrier 2 (e-12). Rural charter schools are referenced in the abstract (e-16) and also includes data on rural students (e-23).

Weaknesses:
There is no data on how the unique needs of students with disabilities and ELLs will be addressed by the three states who will partner with them.

Reader's Score: 4