

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

Status: Submitted

Last Updated: 06/21/2018 12:07 PM

## Technical Review Coversheet

Applicant: Waterford Montessori Academy (U282E180003)

Reader #2: \*\*\*\*\*

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	15	12
<b>Quality of Project Design</b>		
1. Project Design	30	14
<b>Quality of Project Personnel</b>		
1. Project Personnel	10	10
<b>Quality of the Management Plan</b>		
1. Management Plan	10	5
<b>Quality of the Eligible Applicant</b>		
1. Eligible Applicant	20	20
<b>Continuation Plan</b>		
1. Continuation Plan	15	15
<b>Sub Total</b>	100	76
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Access to High-Quality Educational Choice</b>		
1. Increasing Access	2	0
<b>Sub Total</b>	2	0
<b>Competitive Preference Priority 2</b>		
<b>Dual or Concurrent Enrollment Programs</b>		
1. Enrollment Programs	2	0
<b>Sub Total</b>	2	0
<b>Total</b>	104	76

# Technical Review Form

Panel #3 - CSP Developers (84.282E) - 3: 84.282E

Reader #2: \*\*\*\*\*

Applicant: Waterford Montessori Academy (U282E180003)

## 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 adequately demonstrated that the proposed program will expand on the current enrollment of educationally disadvantaged students. For example, the applicant indicated that for the 2017/2018 school year, Waterford Montessori Academy served a population of 253 students of which 28.85% were identified as economically disadvantaged which is a 15% increase from the prior year. (pg.12-14) The applicant indicated that with the growth of more disadvantaged families in the targeted region and the new expanded location the school has the potential to recruit more students.

Additionally, the applicant demonstrated that the increase in academic proficiency for economically disadvantaged students attending Waterford Montessori Academy has increased over the past three years using the state mandated assessment program (MStep) and the applicant believes this could be attributed to the Montessori program impact on student achievement and differentiated instructional methods.

#### Weaknesses:

The applicant did not provide a recruitment and enrollment plan. Without this information it is difficult to determine how the applicant will meet enrollment goals.

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: 14

#### 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 provided reasonable goals, objectives and some measurable performance outcomes. The applicant indicated the goals are aligned with their charter school standards. For example, the applicant indicated that by using a recognized norm-referenced test, the proposed program's goal is for students to achieve scores equal to or greater than the grade level reading and math College/Career Readiness (CCR) target, and that the percent of students meeting their projected score will average 80%, which is 1 year's growth. (pgs. 16-17)

**Weaknesses:**

The applicant provided very general goals and objectives that were more related to operational tasks and activities. These goals are not measurable. For example, one of the goals is to fully equip 10- 12 classrooms and the measurable outcome are the purchase orders, invoices, checks, and inventory. The goals as stated are not related to the implementation of a high-quality educational program for students. (pgs. 16-17)

**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:**

The applicant indicated that the Montessori curriculum and instructional philosophy accommodates children of all learning styles. (pg. 15)

**Weaknesses:**

The applicant did not provide a thorough response to the selection criteria to explain how the proposed program will address the needs of the target population. More information is needed to align with the fact that the applicant indicated the proposed program will address the educational needs of educationally disadvantaged students.

**Reader's Score: 4**

**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: 10**

**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 reasonably demonstrated the proposed expansion program will make an effort encourage applications for employment from persons who are members of groups that have traditionally been underrepresented. The applicant has begun to identify a diverse staff. For example, the applicant indicated they have identified four teachers for the Elizabeth Lake Road expansion/replication. Three (75%) of the identified

**Sub Question**

teachers are female with one (25%) male. One (25%) teacher is African American while the remainder (75%) is white. Two of the teachers (50%) are over the age of fifty. (pgs. 19-20)

**Weaknesses:**

No weaknesses noted.

**Reader's Score: 1**

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

**Strengths:**

The applicant effectively demonstrated that the proposed program will be implemented by key personnel with relevant training and experiences. The school is governed by a five-member board. A review of the resumes indicated that the School Director who has 40 years of experience in education is the chief administrator of the school and will be responsible for overall leadership within the school. The Director will organize, supervise, and evaluate the development of the curriculum, school programs, staff and student achievement while simultaneously overseeing day-to-day operations of the school.

Additionally, the Project Director has vast experience in charter school management and operations. He has served as the Superintendent at a Michigan charter school prior to his employment with Waterford Montessori Academy. He also has extensive experience as a Charter Contract Administrator working for Central Michigan University in their Charter Schools Office. He will ensure timely completion of all tasks. (pgs.18-22)

**Weaknesses:**

No weaknesses noted.

**Reader's Score: 9**

**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 applicant provided a reasonable management plan aligned with the project operational objectives. Each task and activity is associated with a timeline for completion, the person responsible and milestones. (pgs. 23-25)

**Weaknesses:**

The applicant provided a timeline for one -year. Most of the activities and tasks listed in the timeline are start-up tasks and activities which can be completed within a year. There were no ongoing activities in the timeline that can account for the implementation of the life of the project. Without this information it is difficult to determine if the proposed project will achieve the goals and objectives of the proposed expansion program.

**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:**

(1)The applicant adequately demonstrated that the proposed program will expand on the current enrollment of educationally disadvantaged students. For example, the applicant indicated that for the 2017/2018 school year, Waterford Montessori Academy served a population of 253 students of which 28.85% were identified as economically disadvantaged which is a 15% increase from the prior year. (pg.12-14) The applicant indicated that with the growth of more disadvantaged families in the targeted region and the new expanded location the school has the potential to recruit more students.

(2)The applicant indicate that student proficiency at Waterford Montessori Academy, as measured by the state's MStep program exceeds that of its 927 peers compared to other LEAs and PSAs throughout the state. The 2016/17 attendance rate for all students at Waterford Montessori Academy was 94.12%. The chart provided depicted a 95% retention rate at Waterford Montessori Academy. This data indicate that the educationally disadvantaged students served by the charter schools have exceeded the average academic achievement results for comparable students in the State.

(3)The applicant indicated that no schools operated by Waterford Montessori Academy have been closed and the Academy is in full compliance with its Charter Contract, applicable state statutes and applicable federal regulations. The annual audit by an independent certified public accounting firm attests to the financial stability of the Academy.

**Weaknesses:**

No weaknesses noted.

**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 reasonably demonstrated that the Waterford Montessori Academy has developed a five-year budget projection based on the combined anticipated enrollment. The current per pupil foundation amount that is provided by the State of Michigan is \$7,631. It is expected that this amount will increase for the 2018/19 school year to \$7,871. State aid represents 80% of the annual revenues with the balance coming from local and federal revenues. Local revenues include preschool tuition and after-school programs. As of June 30, 2017, the Academy had established a positive net position of \$670,749 increased \$49,298 from the prior 2016 fiscal year. The 2017/2018 annual budget anticipates \$2,245,276 in general fund revenues. 80% of the Academy's annual funding comes from the State and the Academy is able to adequately operate the instructional programs based on this revenue. It is anticipated that the Academy will receive between \$5,103,716 and \$5,503,220 each year over the next five years with the addition of the Elizabeth Lake Road campus. (pg. 27)

**Weaknesses:**

No weaknesses noted.

**Reader's Score: 15**

**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:**

No strengths noted.

**Weaknesses:**

Although the applicant indicated the proposed expansion program will serve for traditionally underserved students including students with disabilities, English language learners, and Native American students, the applicant did not provide any more narrative to document how educational choices will be provided to these groups of students. The applicant further did not evidence how the program will serve the needs of these groups of students. This information is crucial in determining how the program will prioritize admission and recruitment for traditionally underserved students.

**Reader's Score:** 0

**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 is not proposing the completion of dual or concurrent enrollment programs or early college high school.

**Weaknesses:**

The applicant is not proposing the completion of dual or concurrent enrollment programs or early college high school.

**Reader's Score:** 0

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**Status:** Submitted

**Last Updated:** 06/21/2018 12:07 PM

Status: Submitted

Last Updated: 06/22/2018 12:12 PM

## Technical Review Coversheet

Applicant: Waterford Montessori Academy (U282E180003)

Reader #1: \*\*\*\*\*

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	15	10
<b>Quality of Project Design</b>		
1. Project Design	30	20
<b>Quality of Project Personnel</b>		
1. Project Personnel	10	8
<b>Quality of the Management Plan</b>		
1. Management Plan	10	7
<b>Quality of the Eligible Applicant</b>		
1. Eligible Applicant	20	16
<b>Continuation Plan</b>		
1. Continuation Plan	15	14
<b>Sub Total</b>	100	75
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Access to High-Quality Educational Choice</b>		
1. Increasing Access	2	0
<b>Sub Total</b>	2	0
<b>Competitive Preference Priority 2</b>		
<b>Dual or Concurrent Enrollment Programs</b>		
1. Enrollment Programs	2	0
<b>Sub Total</b>	2	0
<b>Total</b>	104	75

# Technical Review Form

Panel #3 - CSP Developers (84.282E) - 3: 84.282E

Reader #1: \*\*\*\*\*

Applicant: Waterford Montessori Academy (U282E180003)

## 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 school notes that it is located in a high-need area and could plausibly serve more high-need students (pp. e22-23), and is looking to serve an “unmet need.”

#### Weaknesses:

The application does not include a plan to actually recruit high-need students. It may potentially enroll many such students, but the application is lacking a directed plan to recruit them. Currently, the school appears to serve fewer economically disadvantaged students (28.85 percent) than the surrounding school district (58 percent) or the state (50.74 percent) does (pp.e31-32).

Reader's Score: 10

### 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: 20

#### 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:

Plans for expansion and the desire for parent training/engagement are clear. As defined on p. e35, some of the goals, objectives, and expected outcomes are clear. The expected outcomes for enrollment, equipment, and teacher certification are clear and measurable (“141 students enrolled at Elizabeth Lake Road in 2018 and 252 students by 2020,” for example). The charter goals are clear on pp. e33-34.

**Sub Question**

**Weaknesses:**

Several of the actual measurement criteria are unclear. For example, the actual methods by which parent engagement will be measured is unclear, even though some items are listed in the table on p. e35. In addition, it is not clear what is meant by "purchase orders" or "checks" as measures. Finally, tying the academic measures of the charter to the project goals would strengthen the application.

**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 application mentions a general statement about Maslow's hierarchy and notes the importance the team places on Montessori training, as well as the need for such training in its locality on pp. e36-37.

**Weaknesses:**

Because it is not a generally understood education method by the general public, parent training, engagement, and outreach are that much more important. However, the application could do more to explicitly describe its promotion and recruitment methods for what is likely a new audience. In addition, the application would be strengthened by more explanation of why its particular model will lead to greater academic success for its particular set of students.

**Reader's Score: 9**

**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:**

None noted.

**Weaknesses:**

Although the application is non discriminatory and notes some existing diverse staff, the application should include more of a plan to recruit underrepresented faculty/staff. This would help the reviewer determine if the applicant actively encourages underrepresented groups.

**Reader's Score: 0**

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

### Sub Question

#### Strengths:

The resumes and experiences as stated in the application on pp. e73-e92 in terms of education, administration, and finance, are appropriate. School leadership has extensive experience in Montessori education, in charter school leadership, and in project/financial management.

#### Weaknesses:

It is unclear in the application who the Project Manager's actual employer is, whether it is the school itself or the contractor (AMS). He is listed as the "Project Manager" (p. e39), but also as the School Director (p. e74). Another individual is also listed as "School Director" (e38). Though there is an organizational chart on p. e47, it is still somewhat unclear. This is an important issue as contracted services play such a large role in the general management of this school and for this specific project.

**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:

Timelines with activities and responsible parties are listed in the application (pp. e42-e43), including beginning and end dates and check-in points. The activities are specific ("Order computers" for example), and the checkpoints include updates for every activity at the monthly board meetings.

#### Weaknesses:

The application notes one report-out, at the end of the grant period, beginning on p. e51. The application would be strengthened by doing more to describe its plans for continuous oversight of its two large contractors and for success of the school if the school decides it is not being well-served by either AMS or EMAN (p. e47). These are both large and involved commitments that the school is contracting out.

**Reader's Score: 7**

### 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:**

- (1) The school appears to show some growth on state tests overall based on the table on p. e44, from 2014-15 through 2016-17, moving from 27 percent of students rated proficient or advanced to 50 percent being rated proficient or advanced.
- (2) Though it has lagged the state in past years, the school now seems to be leading the state in academic achievement (50 percent of students at the school rates as proficient or advanced on the state tests, compared to 28 percent for the state overall). The school appears to be enrolling slightly more disadvantaged students over time based on the table on p. e31.
- (3) The school has not been subject to charter revocation or closure as noted on p. e44.

**Weaknesses:**

- 1) The application would be strengthened by including more data, disaggregated for these subgroups. The data should also be reported out by individual tests, rather than as a whole. This is especially true as the school actually seems to enroll disadvantaged students at a meaningfully lower rate than the surrounding district.
- (2) No weaknesses noted.
- (3) No weaknesses noted.

**Reader's Score: 16**

**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:**

According to the table on p. e45 the school has sustainable, adequate levels of current and anticipated funding, an improving financial position, and a plan for the future. For example the school's general fund is projected to increase from \$514,201 in 2018-19 to \$2,096,920 in 2022-23.

**Weaknesses:**

Given the large role contractors play in the operation of the school (AMS) and in this application (grant management through EMAN), the application would be strengthened by addressing the board's independence from the contractor. For example, the application does not address a plan if either AMS or EMAN needs to be released at any point during the project period.

**Reader's Score: 14**

**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:**

None noted.

**Weaknesses:**

Although the school notes that it is in a high need area and asserts a willingness to accept more disadvantaged students, the application would be strengthened by including a specific plan for recruiting disadvantaged students.

**Reader's Score: 0**

**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:**

Not addressed.

**Weaknesses:**

Not addressed.

**Reader's Score: 0**

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**Status:** Submitted  
**Last Updated:** 06/22/2018 12:12 PM

Status: Submitted

Last Updated: 06/22/2018 12:29 PM

## Technical Review Coversheet

Applicant: Waterford Montessori Academy (U282E180003)

Reader #3: \*\*\*\*\*

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	15	11
<b>Quality of Project Design</b>		
1. Project Design	30	15
<b>Quality of Project Personnel</b>		
1. Project Personnel	10	9
<b>Quality of the Management Plan</b>		
1. Management Plan	10	8
<b>Quality of the Eligible Applicant</b>		
1. Eligible Applicant	20	15
<b>Continuation Plan</b>		
1. Continuation Plan	15	15
<b>Sub Total</b>	100	73
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Access to High-Quality Educational Choice</b>		
1. Increasing Access	2	0
<b>Sub Total</b>	2	0
<b>Competitive Preference Priority 2</b>		
<b>Dual or Concurrent Enrollment Programs</b>		
1. Enrollment Programs	2	0
<b>Sub Total</b>	2	0
<b>Total</b>	104	73

# Technical Review Form

Panel #3 - CSP Developers (84.282E) - 3: 84.282E

Reader #3: \*\*\*\*\*

Applicant: Waterford Montessori Academy (U282E180003)

## 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 2017 Test results on MStep indicate a positive trend for Math achievement results. ELA proficiency has varied from approximately 40% to 55% over the three years of data (e32).

Waterford Montessori Academy demonstrated steady and significant increases in academic performance of economically disadvantaged students while schools of similar demographics and the state of Michigan average both were stagnant in growth. The data is offered as specific to economically disadvantaged students, indicating that over time, WMA is enabling this subgroup to make gains at a rate that exceeds other educational settings (e33).

#### Weaknesses:

The existing school services a student population of 28.85% economically disadvantaged, disproportionately lower than the state's 50.74% and the district's 58% (e31-e32). While the school's performance data indicate that this group is well served once enrolled in the school, more specific outreach and recruiting is needed to ensure that the school population better reflects the district population and specifically attracts the educationally disadvantaged subgroups.

Reader's Score: 11

### 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: 15

#### 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:

Educational goals (Standards) in the original Charter Contract are included and appropriate. Standard 2 is specifically measurable as a direct comparison to the district on state assessments is indicated, although a time

**Sub Question**

frame is not (e33-e34).

Project goals for expansion are clearly defined with completion dates and expected outcomes for grade level offerings, equipping of classrooms, computer labs, and Montessori teacher training (e35).

**Weaknesses:**

Academic standards include a mix of highly measurable goals (outperform district on state-identified proficiency test, SCGP at a fiftieth percentile or higher, scores equal to or greater than CCR target, and percent of students meeting projected score will average 80%) and goals that are less numerically defined (demonstrates measurable progress toward grade level targets, making sufficient progress) e33-e34.

Parent Involvement and Engagement is less clearly defined. Regular workshops are mentioned but not defined in scope or objective (e35).

**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:**

This section includes an overview of the Montessori method and a research basis for the approach's ability to facilitate self-paced learning and promote independence (e36-e37).

**Weaknesses:**

The overview of the Montessori approach is succinctly articulated, yet the appropriateness of the method for the target population is not specifically addressed. The extent to which the target population subgroups will benefit from the expansion is not addressed.

**Reader's Score: 4**

**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: 9**

**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:**

No strengths found.

**Sub Question**

**Weaknesses:**

Although the proposal lists four potential hires for teaching positions that represent diversity in gender, race, and age( e39), this in and of itself does not represent committed policies or procedures to ensuring ongoing diversity.

The proposal indicates a commitment to diversity and encouraging applications from underrepresented groups, yet does not indicate specific steps towards accomplishing these objectives (e39).

**Reader's Score: 0**

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

**Strengths:**

The School Director and Project Director possess the relevant education, training, and administrative experience to oversee an expansion of the existing model (e38-e40).

The Project Director has an M.P.A. and experience directing the school. The School Director has significant Montessori experience, having consulted on Montessori expansion for the last 25 years.

**Weaknesses:**

No weaknesses can be found in this section of the proposal.

**Reader's Score: 9**

**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 application includes an appropriate description of the physical work and legal requirements necessary for new site operations. This work will be accomplished with funding separate from this grant application. Adequate reserve funds are indicated to support the replication process if needed (e41).

Specific project activities directly linked to project design are included with timelines for completion (e42-43).

**Weaknesses:**

Ongoing activities beyond the initial year are not clearly indicated. It is therefore unclear how the project will be managed in subsequent years.

**Reader's Score: 8**

## 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:

Michigan school data on state tests indicate high proficiency ratings for economically disadvantaged students as compared to district and state averages. Proficiency for this subgroup has significantly improved for the last two years of available data (e44). The data would indicate a strong capacity of the school to increase academic achievement to economically disadvantaged students.

The application claims that no schools operated by Waterford Montessori Academy have been closed. The financial health of the school has been verified by an independent audit (e44-e45).

Data from 2016-2017 indicate a 94% attendance rate and a 95% retention rate, demonstrating student interest and parental support (e68-e69).

The application attests to no significant compliance or management issues that would threaten the school's charter (e69).

### Weaknesses:

Performance data for other subgroups (ELL's, students with disabilities, racial minorities) are not offered in this section of the application.

Comparison data for district and state attendance/retention are not made available.

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 application indicates an ability to sustain the educational program separate from the outcome of this grant application. State per pupil funding of \$7,631 supports the operation and the addition of the Elizabeth Lake Road Campus will result in revenues of \$5.1 million to \$5.4 million (e45).

Projected revenues and expenditures over the next five years indicate a growing surplus resulting in a sizeable reserve fund for future operations (e45). The financial projections are strong and indicate that the school would not be reliant on future federal grant assistance to maintain operations.

**Weaknesses:**

No weaknesses found in this section.

**Reader's Score: 15**

**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:**

No strengths found.

**Weaknesses:**

While the population of Waterford School District has a significant percentage of economically disadvantaged students, students with disabilities and ELLs, the demographic population of the existing charter school itself is not included in this section. It is unclear, therefore, the extent to which priority subgroups are experiencing increased access to educational choice. A later section of the proposal indicates that the school itself services a student population of 28.85% economically disadvantaged, disproportionately lower than both the state and the school district (e31-32).

Furthermore, data on performance on subgroups is not included and it is therefore not possible to ascertain the extent to which improved academic outcomes and learning environments are being created by the existence of the charter school.

Although proposal claims a grassroots origin of existing charter school serving a district with approximate subgroup populations of 16% students with disabilities and 8% ELL (e30), it is not clear how these groups will be recruited for the expansion school.

**Reader's Score:** 0

**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:**

No strengths can be found.

**Weaknesses:**

It is argued that a Montessori experience can assist students in developing the executive functions necessary to succeed in college and beyond, but this argument is made without specific evidence. It is also disconnected from the project's ability "to increase student access to, participation in, and completion of dual or concurrent enrollment programs or early college high schools" (e30).

**Reader's Score:** 0

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