

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

Status: Submitted

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Technical Review Coversheet

Applicant: IDEA Public Schools (U282M180022)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the eligible applicant		
1. Quality of the Applicant	45	45
Significance		
1. Disadvantaged Students	30	30
Quality of the Project Evaluation		
1. Evaluation Plan	10	9
Quality of the Management Plan		
1. Management Plan	15	15
Priority Questions		
Competitive Preference Priority 1		
Promoting Diversity		
1. Promoting Diversity	3	3
Competitive Preference Priority 2		
Reopening Poor-performing Public Schools		
1. Reopening Public Schools	3	3
Competitive Preference Priority 3		
High School Students		
1. High School Students	3	3
Competitive Preference Priority 4		
Replicating/Expanding High-quality Charter Schools		
1. Replicating/Expanding	3	0
Total	112	108

Technical Review Form

Panel #4 - CMO - 4: 84.282M

Reader #1: *****

Applicant: IDEA Public Schools (U282M180022)

Questions

Selection Criteria - Quality of the eligible applicant

1. Selection Criteria 1: Quality of the eligible applicant

Reader's Score: 45

Sub

1. (i) 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 served by other public schools in the State.

Strengths:

The applicant provides data showing that the schools have outperformed the local school district and state averages for all grades and all subjects overall, as well as for educationally disadvantaged subgroups (Socioeconomic disadvantaged, ELL, Students with Disabilities (p e40). IDEA maintains higher attendance rates than the region and the state across subgroups (p e41). Comparative high school data also indicates that IDEA schools are comparatively higher performing than regional and state peers on indicators such as graduation rates, AP performance, college attendance rates (p e44-45).

Weaknesses:

There are no weaknesses to note in this section.

Reader's Score: 15

2. (ii) The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation.

Strengths:

The applicant has had no school closures, charter revocations or terminated affiliations (p e47). They have provided documentation within the body of the application that supports that they are a sound organization and capable of managing and sustaining a large scale grant project and school expansion.

Weaknesses:

There are no weaknesses to note in this area.

Sub

Reader's Score: 15

3. (iii) The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter.

Strengths:

The applicant does not have any significant issues in the area of financial or operational compliance (p e48). They have a BBB+ rating from Standard and Poor's (p e48).

Weaknesses:

There are no weaknesses to note in this area.

Reader's Score: 15

Selection Criteria - Significance

1. Selection Criteria 2: Significance of contribution in assisting educationally disadvantaged students

In determining 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, the Secretary considers the following factors:

Reader's Score: 30

Sub

1. (i) The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, particularly students with disabilities and English learners, at rates comparable to surrounding public schools or, in the case of virtual charter schools, at rates comparable to public schools in the State.

Strengths:

The applicant serves educationally disadvantaged students at comparable or higher rates than surrounding districts with a student population of 88.6% low-income and 36% ELL (p e49). Although the percentage of special education students seems low, it has increased at a rate higher than overall enrollment (p e49).

Weaknesses:

There are no weaknesses to note in this section.

Reader's Score: 15

2. (ii) The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit, enroll, and effectively serve educationally disadvantaged students, particularly students with disabilities and English learners.

Strengths:

IDEA has taken specific and strategic steps at recruiting and retaining families with students who are educationally disadvantaged (parent events, IMPACT magazine, specific events for RISE students) (p. e51). The enrollment rate

Sub

of special education students is increasing at a higher rate than overall enrollment (p. e49).

Weaknesses:

There are no weaknesses to note in this section.

Reader's Score: 15

Selection Criteria - Quality of the Project Evaluation

1. Selection Criteria 3: Quality of the evaluation plan for the proposed project

In determining the quality of the evaluation plan for the proposed project, 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 proposed project, as described in the applicant's logic model, and that will produce quantitative and qualitative data by the end of the grant period.

Strengths:

The applicant has previous experience with the CSP grant and is able to apply it to their evaluation plan (p e56). The organization has an internal Research and Analysis team and includes rationale for using an internal evaluation model which includes qualitative and quantitative measures (p e56). A logic model is included includes specific goals and metrics for expansion sites (p e55).

Weaknesses:

The evaluation will be conducted using an internal team and two roles have yet to be filled (p e59). While rationale is provided for relying only on an internal team, a project of this scale may benefit from external expertise, accountability and validity assurances.

Reader's Score: 9

Selection Criteria - Quality of the Management Plan

1. Selection Criteria 4: Quality of the Management Plan

In determining the quality of the applicant's management plan, the Secretary considers the following factors:

Reader's Score: 15

Sub

- 1. (i) The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model required under section 4305(b)(3)(B)(iii) of the ESEA (5 points). (NFP)**

Strengths:

The applicant is experienced in new school start up and has proven plan for new locations to reach solvency in the third year of opening (p e73). The applicant describes a diverse source of new funding which ensures sustainability beyond the grant program (p e73).

Sub

Weaknesses:

No weaknesses are noted in this section.

Reader's Score: 5

- 2. (ii) 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. (34 CFR 75.210(g)(2)(i))**

Strengths:

The applicant includes a clear and well-developed timeline for replication and expansion of proposed schools which includes responsibilities of the various central office teams (p e74-76).

Weaknesses:

There are no weaknesses in this section to note.

Reader's Score: 5

- 3. (iii) The qualifications, including relevant training and experience, of key project personnel. (34 CFR 75.210(e)(3)(ii))**

Strengths:

The applicant has highly qualified and experienced team managing the project and there is a dedicated team focused on grant management (p e76-77). The resumes included reflect a team of highly qualified individuals with the experience needed to implement this project.

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 5

Priority Questions

Competitive Preference Priority 1 - Promoting Diversity

1. Competitive Preference Priority 1— Promoting Diversity.

Under this priority, applicants must propose to replicate or expand high-quality charter schools that have an intentional focus on recruiting students from racially and socioeconomically diverse backgrounds, and maintaining racially and socioeconomically diverse student bodies in those charter schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant intends to replicate schools with an intentional focus on diversity. IDEA developed a desegregation plan in 2016 and has demonstrated success with using these strategies to achieve diversity and avoid racial isolation (p e23). Subsequently, the applicant provides data to demonstrate a 163% growth in African American enrollment over the past five years (p e24). Currently, IDEA schools serve 89% Hispanic and 5% African American students with a range of free- and reduced lunch eligible students from 66% to 99% (p e22).

Weaknesses:

No weaknesses to note in this section.

Reader's Score: 3

Competitive Preference Priority 2 - Reopening Poor-performing Public Schools

1. Competitive Preference Priority 2— Reopening Academically Poor-performing Public Schools as Charter Schools

Under this priority, applicants must:

(i) Demonstrate past success working with one or more academically poor-performing public schools or schools that previously were designated as persistently lowest-achieving schools or priority schools under the former School Improvement Grant program or in States that exercised ESEA flexibility, respectively, under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB); and

(ii) Propose to use grant funds under this program to reopen one or more academically poor-performing public schools as charter schools during the project period by--

(A) Replicating one or more high-quality charter schools based on a successful charter school model for which the applicant has provided evidence of success; and

(B) Targeting a demographically similar student population in the replicated charter schools as was served by the academically poor-performing public schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant has demonstrated past success with turning around IDEA Frontier and it is now ranked as the 12th best high school in Texas (p e28). Additionally, IDEA plans to work with a poorly performing school in Midland and replicate its model there (p e29).

Weaknesses:

There are no weaknesses to note in this section.

Reader's Score: 3

Competitive Preference Priority 3 - High School Students

1. Competitive Preference Priority 3— High School Students.

Under this priority, applicants must propose to:

(i) Replicate or expand high-quality charter schools to serve high school students, including educationally disadvantaged students;

(ii) Prepare students, including educationally disadvantaged students, in those schools for enrollment in postsecondary education institutions through activities such as, but not limited to, accelerated learning programs (including Advanced Placement and International Baccalaureate courses and programs, dual or concurrent enrollment programs, and early college high schools), college counseling, career and technical education programs, career counseling, internships, work-based learning programs (such as apprenticeships), assisting students in the college admissions and financial aid application processes, and preparing

students to take standardized college admissions tests;

(iii) Provide support for students, including educationally disadvantaged students, who graduate from those schools and enroll in postsecondary education institutions in persisting in, and attaining a degree or certificate from, such institutions, through activities such as, but not limited to, mentorships, ongoing assistance with the financial aid application process, and establishing or strengthening peer support systems for such students attending the same institution; and

(iv) Propose one or more project-specific performance measures, including aligned leading indicators or other interim milestones, that will provide valid and reliable information about the applicant's progress in preparing students, including educationally disadvantaged students, for enrollment in postsecondary education institutions and in supporting those students in persisting in and attaining a degree or certificate from such institutions. An applicant addressing this priority and receiving a CMO grant must provide data that are responsive to the measure(s), including performance targets, in its annual performance reports to the Department.

(v) For purposes of this priority, postsecondary education institutions include institutions of higher education, as defined in section 8101(29) of the ESEA, and one-year training programs that meet the requirements of section 101(b)(1) of the Higher Education Act of 1965, as amended (HEA).

Strengths:

The applicant currently serves educationally disadvantaged high school students and with the replication grant, will open over 35,000 new high school students (p e30). The IDEA college prep model includes a rigorous curriculum, college admissions counseling, test preparation, and persistence support while in college (p e33-39).

Weaknesses:

There are no weaknesses to note in this section.

Reader's Score: 3

Competitive Preference Priority 4 - Replicating/Expanding High-quality Charter Schools

1. Competitive Preference Priority 4— Replicating or Expanding High-quality Charter Schools to Serve Native American Students.

(i) Propose to replicate or expand one or more high-quality charter schools that--

(A) Utilize targeted outreach and recruitment in order to serve a high proportion of Native American students, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws;

(B) Have a mission and focus that will address the unique educational needs of Native American students, such as through the use of instructional programs and teaching methods that reflect and preserve Native American language, culture, and history; and

(C) Have a governing board with a substantial percentage of members who are members of Indian Tribes or Indian organizations located within the area to be served by the replicated or expanded charter school;

(ii) Submit a letter of support from at least one Indian Tribe or Indian organization located within the area to be served by the replicated or expanded charter school; and

(iii) Meaningfully collaborate with the Indian Tribe(s) or Indian organization(s) from which the applicant has received a letter of support in a timely, active, and ongoing manner with respect to the development and implementation of the educational program at the charter school.

Strengths:

The applicant does not specifically address this component of the competitive preference priority.

Weaknesses:

The applicant does not specifically address this component of the competitive preference priority.

Reader's Score: **0**

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Technical Review Coversheet

Applicant: IDEA Public Schools (U282M180022)

Reader #2: *****

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1. Quality of the Applicant	45	45
Significance		
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Quality of the Project Evaluation		
1. Evaluation Plan	10	10
Quality of the Management Plan		
1. Management Plan	15	15
Priority Questions		
Competitive Preference Priority 1		
Promoting Diversity		
1. Promoting Diversity	3	3
Competitive Preference Priority 2		
Reopening Poor-performing Public Schools		
1. Reopening Public Schools	3	3
Competitive Preference Priority 3		
High School Students		
1. High School Students	3	3
Competitive Preference Priority 4		
Replicating/Expanding High-quality Charter Schools		
1. Replicating/Expanding	3	0
Total	112	109

Technical Review Form

Panel #4 - CMO - 4: 84.282M

Reader #2: *****

Applicant: IDEA Public Schools (U282M180022)

Questions

Selection Criteria - Quality of the eligible applicant

1. Selection Criteria 1: Quality of the eligible applicant

Reader's Score: 45

Sub

1. (i) **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 served by other public schools in the State.**

Strengths:

The applicant provided comprehensive evidence to document the academic growth, annual student performance on statewide assessments and annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates for educationally disadvantaged students served by the charter schools as compared to students served by other public schools in the State. For example, the applicant indicated that IDEA receives a grade of 93% from the state of Texas and a grade of 80% from the state of Louisiana. The average ACT score of 21 out of 35 and 34% of graduates were named AP Scholars (earn scores of 3+ on at least 3 AP exams). 100% of graduates accepted to a college or university and 99% of graduates matriculate to college/university and 25% of students graduate college in 4 years and 55% graduate in 6 years. (pgs. 40-43)

The applicant provided numerous charts that demonstrated that schools under their management has succeeded in student academic achievement for all students as well as for student subgroups—African American, Hispanic, White, Special Education, Economically Disadvantaged, and English-language Learners. For example, in the IDEA schools, there is a high poverty rate among Hispanic and African American students; the low rate of college completion for low-income students overall (10%); and the staggering college readiness achievement gap (23- to 25-point gap between white and Hispanic students in 4th and 8th grade math and 4th and 8th grade reading). Of all Texas high school graduates, only 54.2% are college, career, and/or military. (pgs. 19-23)

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Sub

2. (ii) **The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation.**

Strengths:

The applicant clearly demonstrated that none of the charter schools operated or managed by the applicant have closed or have had a charter revoked due to noncompliance or termination due to statutory or regulatory irregularities in their 18-year history. The applicant indicated that over the next five years, the IDEA network will grow the CMO from 79 to 199 schools and will increase the number of low-income, high-needs students it serves by 131% from the 44,653 currently enrolled to a projected 125,000 by the end of the CSP funding period in 2023-24. (pg. 27)

Weaknesses:

No weaknesses noted.

Reader's Score: 15

3. (iii) **The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter.**

Strengths:

The applicant clearly demonstrated that none charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter. For example, the applicant indicated that IDEA has met the high bar of accessing the Permanent School Fund (PSF) bond program each year it has been available to public charter schools. To obtain access to this annual program, schools must show at least three consecutive years of financial audits with unqualified or unmodified opinions, receive an investment grade credit rating from a national agency, and maintain an academic rating of "Met Standard" from the Texas Education Agency and the Texas Education Agency (TEA) has approved IDEA to expand its charter with additional schools every year for the past 13 years. As noted, IDEA received an unmodified opinion on the financial statements as a whole from independent auditors has a BBB+ investment grade credit rating from Standard & Poor's. (pgs. 33-34)

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Significance

1. Selection Criteria 2: Significance of contribution in assisting educationally disadvantaged students

In determining 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, the Secretary considers the following factors:

Reader's Score: 30

Sub

1. (i) **The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, particularly students with disabilities and English learners, at rates comparable to surrounding public schools or, in the case of virtual charter schools, at rates comparable to public schools in the State.**

Strengths:

The applicant comprehensively demonstrated that the charter schools currently operated or managed by the CMO serve educationally disadvantaged students, students with disabilities and English learners, at rates comparable to surrounding public schools. The applicant provided numerous data sources as evidence that IDEA serves a low-income population at all of its 79 current schools. For example, the applicant indicated that the percent of students eligible for free- and reduced-price meals ranges from 66.14% (IDEA Kyle College Preparatory) to 99.41% (IDEA Elsa Academy)—26.14 and 59.41 percentage points, respectively, higher than the 40% local schools. Additionally, IDEA serves educationally disadvantaged students at comparable or higher rates than surrounding districts IDEA's student population is 88.6% low-income and 36% ELL—a highly educationally disadvantaged student body. In addition, over half—50.7%—of all IDEA's students are considered at-risk of dropping out of school due to one or more social, economic, or academic factors. (pgs. 29-32 and Appendix I.8))

The applicant indicated that their Special Education population has increased at a higher rate than its overall enrollment. For example, the applicant evidenced that from 2014-15 to 2018-19, the number of ED students enrolled at IDEA has risen 171%, and the number of students with Autism has risen 209%. Overall, 5.2% of IDEA students are served by Special Education programs in the various CMO regions. For example, outside of the Rio Grande Valley, the percent of students served is 7.51% in Austin and in El Paso, and 7.24% in San Antonio, much closer to the state average of 9.1%. Several IDEA schools serve Special Education populations that are significantly higher than the state average (IDEA Eastside College Prep: 10.66%; IDEA Rundberg College Prep: 11.2%; IDEA Edgemere College Prep: 11.9%; IDEA Judson College Prep: 12.22%; IDEA Walzem College Prep: 12.74%; IDEA Rio Vista College Prep: 14.29%; and IDEA Ingram Hills College Prep: 18.58%.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

2. (ii) **The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit, enroll, and effectively serve educationally disadvantaged students, particularly students with disabilities and English learners.**

Strengths:

The applicant comprehensively demonstrated that the proposed project plan includes strategies to replicate or expand to intentionally recruit, enroll, and effectively serve educationally disadvantaged students, particularly students with disabilities and English learners. The applicant indicated that IDEA accepts all students through an open-enrollment lottery process and excludes no student due to emotional, physical, or learning disability or linguistic need. The applicant will utilize various public media and recruitment strategies to increase public access to information about the district's special education program and parents in English and Spanish, such as a mailing to 30,000 IDEA households. For the proposed CSP grant, IDEA will add 56 expansion schools and 38 replication schools. This will add a total of 30,886 high-quality, open-enrollment charter school seats during the grant period which will increase the number of low-income students from traditionally underserved communities in Texas, Louisiana, and Florida. (pgs. 30-32)

Sub

The applicant indicated that at this time, the CMO has a commitment to open its first school(s) in Texas's Permian Basin, where the majority of traditional public schools are low-performing. Additionally, in 2021-22, IDEA will partner with Ector County ISD (Odessa, TX) in the same PB region where on average, only 17% of students in this region complete college as compared with 45% of IDEA's students. IDEA will replicate its open-enrollment charter school model, including the same curriculum and school leadership model. In both proposed schools, the student population in the replicated charter schools will likely be demographically similar (or even the same) as was served by the academically poor performing public schools.

For example, in 2017-18, Midland's student population was majority-minority (61.9% Hispanic, 25.8% white 7.6% African American, 4.2% other races/ethnicities) and majority low-income (50.4%). Ector County ISD's student population was 75.5% Hispanic, 18.2% white, 3.9% African American, 2.1% other races/ethnicities, and 51% low-income.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Quality of the Project Evaluation

1. Selection Criteria 3: Quality of the evaluation plan for the proposed project

In determining the quality of the evaluation plan for the proposed project, 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 proposed project, as described in the applicant's logic model, and that will produce quantitative and qualitative data by the end of the grant period.

Strengths:

The applicant provided a comprehensive evaluation plan and logic model that clearly aligned the methods of evaluation including correlating objective performance measures. The Logic model and the evaluation plan explains how the evaluation will assess the intended outcomes of the proposed project and produce quantitative and qualitative data by the end of the grant period. The applicant provided details outlining evaluation methods and procedures currently in place called the State Accountability Projection Models. The model includes and tracking tools and standardized student achievement reporting across all assessments. The dashboard used to track school metrics was developed in house allows the CMO and school leaders to focus on data-driven outcomes. The CMO research team collects data on org-wide metrics on a quarterly basis and compares performance across each region (case studies, quasi-experimental designs) so network leaders can highlight best practices and offer support where it is needed. The research team has in place evidence-based evaluation plans and methods in place to measure and report on the following: Student achievement, growth, and persistence (year-over-year enrollment at IDEA and IHE), programmatic impact staff performance, training, skill assessment, and satisfaction, and retention/attrition.

Based on the system in place, the evaluation plan is aligned with the logic model and specific performance measures related to identifying and comparing strategic elements of the network's expansion and sustainability with that of other regions, as well as student performance. The applicant has in place plans in the evaluation to track organization-wide goals and targets, which also include the program performance measures (GPRA) over the five-year project period. The timeline for producing reports are quarterly and the applicant will collect formative data to facilitate decision-making and annually to produce an annual evaluation report on all project components, including preliminary and key findings and the final report summarizing the results of the entire CSP expansion project. (pgs. 35-43)

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan

1. Selection Criteria 4: Quality of the Management Plan

In determining the quality of the applicant's management plan, the Secretary considers the following factors:

Reader's Score: 15

Sub

- 1. (i) The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model required under section 4305(b)(3)(B)(iii) of the ESEA (5 points). (NFP)**

Strengths:

The applicant clearly demonstrated that the CMO has the ability to sustain the operation of the replicated or expanded charter schools after the grant has ended. The IDEA Public Schools appears to be fiscally sound and with sufficient management capability to support the rapid growth of its charter school model. The applicant evidenced the sustainability through the listing of several major funding sources. For example, in addition to the CSP grants awarded in 2010, 2014, 2016, and 2017, IDEA has raised over \$118M from the following investors, many of whom have renewed their commitments with IDEA to fund the 2022 expansion. Top lifetime gifts are as follows: Texas Education Agency—competitive grants to fund program innovation: \$12,798,255; Charter School Growth Fund: \$22,500,000; Ewing Halsell Foundation: \$15,505,000; Laura and John Arnold: \$10,000,000; Michael and Susan Dell: \$7,750,000; Sid Richardson Foundation: \$7,000,000; Kleinheinz Capital Partners: \$7,000,000; Council on Regional Economic Expansion and Educational Development (CREEED): \$7,000,000; Walton Family Foundation: \$5,000,000; Bill and Melinda Gates: \$4,298,721; Brown Foundation: \$1,505,000; Rainwater Charitable Foundation: \$1,500,000; George W. Brackenridge Foundation: \$1,005,000; KLE Foundation: \$17,932,400. Additionally, on average, each IDEA campus achieves public funding solvency in its third year after opening.

Weaknesses:

No weaknesses noted.

Reader's Score: 5

- 2. (ii) 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. (34 CFR 75.210(g)(2)(i))**

Strengths:

The applicant provided a comprehensive management plan that clearly outlined a blueprint for the CMO to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks. The applicant indicated in detail that IDEA will achieve the

Sub

objectives of the proposed project with established processes and an experienced management team. The applicant provided a detailed timeline of key project management activities and positions responsible. The timeline outlines all of the major school launch activities by month (beginning 30 months prior to launch) and by team responsible. For example, in the first three months of grant award, the applicant will utilize this time to approve new regions, hire new region personnel and organized new Boards in those regions. (pgs. 46-48)

Weaknesses:

No weaknesses noted.

Reader's Score: 5

3. (iii) The qualifications, including relevant training and experience, of key project personnel. (34 CFR 75.210 (e)(3)(ii))

Strengths:

The applicant thoroughly describes the qualifications, relevant training and experience of the key project personnel. Based on a review of the resumes and bios the key personnel have many years of experience with charter school operations, management and program grant implementation. The applicant indicated with the expansion, many new key personnel positions will be hired in the future. However, the 2019 CSP Project Director has extensive experience overseeing and reporting on multi-million-dollar, multi-year federal, state, and philanthropic grants awarded to IDEA and works closely with IDEA's Growth Team.

The applicant has put in place a GrantEd Team who will work with grant managers at IDEA Public Schools to ensure they have the tools, resources, and knowledge to ensure fidelity of program implementation and financial management of grant funded projects across the district. GrantEd is a team of nine grant managers who meet quarterly to problem solve, share best practices in grant management. The GrantEd Team supports the management and implementation of 14 state, federal competitive, and federal formula grants totaling \$130M in awarded funds. The Project Director will be supported by key staff at IDEA to supports the leadership teams in all IDEA schools as they implement the instructional program by managing regional Executive Directors. She has served IDEA for 18 years and has held the role of superintendent for the past six years. The Chief Operating Officer and her team oversee several functions: marketing and communications, student recruitment, information technology, data management, transportation, child nutrition, facilities maintenance, school operations and construction. The Chief College and Diversity Officer sets the vision and strategy has served IDEA for 7 years. (pgs. 54-56)

Weaknesses:

No weaknesses noted.

Reader's Score: 5

Priority Questions

Competitive Preference Priority 1 - Promoting Diversity

1. Competitive Preference Priority 1— Promoting Diversity.

Under this priority, applicants must propose to replicate or expand high-quality charter schools that have an intentional focus on recruiting students from racially and socioeconomically

diverse backgrounds, and maintaining racially and socioeconomically diverse student bodies in those charter schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant provided a comprehensive and focused narrative that clearly demonstrated that the applicant is proposing to support 56 schools for expansion schools and 38 replication schools in the Rio Grande Valley, Austin, San Antonio, El Paso, Tarrant County (Fort Worth), Texas' Permian Basin, and Houston; Southeastern Louisiana (New Orleans and East Baton Rouge), and Tampa Bay, Florida, adding a total of 30,886 new high-quality charter school seats (56,400 at full scale). (pgs. 2-3)

Currently the applicant serves a student population that is 88.6% economically disadvantaged and 94.7% Black or Hispanic. IDEA will use CSP funding to replicate its diverse school model, where the student population across all IDEA schools is 89.2% Hispanic, 5.5 % African American, 3.9% white, and 1.4% other races and ethnicities. IDEA is proposing to expand into new regions, for example in Southern Louisiana where 79% of students are African American, 77% of the teachers and administrators are African American. IDEA Public Schools is an open-enrollment charter management organization currently operating 79 schools where students enroll after being chosen by lottery. No enrollment preference is given to students of any particular race or economic profile, and no race of students is excluded or limited.

Weaknesses:

No weaknesses noted.

Reader's Score: 3

Competitive Preference Priority 2 - Reopening Poor-performing Public Schools

1. Competitive Preference Priority 2— Reopening Academically Poor-performing Public Schools as Charter Schools

Under this priority, applicants must:

(i) Demonstrate past success working with one or more academically poor-performing public schools or schools that previously were designated as persistently lowest-achieving schools or priority schools under the former School Improvement Grant program or in States that exercised ESEA flexibility, respectively, under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB); and

(ii) Propose to use grant funds under this program to reopen one or more academically poor-performing public schools as charter schools during the project period by--

(A) Replicating one or more high-quality charter schools based on a successful charter school model for which the applicant has provided evidence of success; and

(B) Targeting a demographically similar student population in the replicated charter schools as was served by the academically poor-performing public schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant clearly demonstrated that the IDEA Public Schools has experience turning around a poor-performing school inside its own network. In 2006-07, student achievement, financial, and human resources data indicated that IDEA Frontier was significantly lagging behind the IDEA's high academic and operational standards, and the school was rated as Priority by the Texas Education Agency. IDEA Frontier is now among the highest performing College Prep schools in the IDEA network and is ranked as the 12th best high school in Texas (up from 15th), 23rd best among all charter high

schools, and 65th best in the nation overall (up from 79th) by the US News and World Report. (pgs. 7-9)

The applicant effectively demonstrated that in 2020-21, in partnership with Midland Independent School District Midland ISD, IDEA will open its first schools in Texas's Permian Basin, or PB (Texas's Region 18 area), where the majority of traditional public schools are low-performing. (Appendix C) The district school Superintendent indicated in letter of support that IDEA was selected to take over a low-performing school because only 16.1% of the current PB students take Advanced Placement courses as compared with 100% of IDEA's students, and of this number, only 39.7% of PB students score at or above criterion on the AP exams as compared with 55.5% of IDEA's students. Only 41.1% of PB students take the SAT or ACT, and only half of those (22.1%) score at or above criterion (effectively fewer than 10 students out of every 100 who test). (pgs. 7-8)

Weaknesses:

No weaknesses noted.

Reader's Score: 3

Competitive Preference Priority 3 - High School Students

1. Competitive Preference Priority 3— High School Students.

Under this priority, applicants must propose to:

- (i) Replicate or expand high-quality charter schools to serve high school students, including educationally disadvantaged students;**
- (ii) Prepare students, including educationally disadvantaged students, in those schools for enrollment in postsecondary education institutions through activities such as, but not limited to, accelerated learning programs (including Advanced Placement and International Baccalaureate courses and programs, dual or concurrent enrollment programs, and early college high schools), college counseling, career and technical education programs, career counseling, internships, work-based learning programs (such as apprenticeships), assisting students in the college admissions and financial aid application processes, and preparing students to take standardized college admissions tests;**
- (iii) Provide support for students, including educationally disadvantaged students, who graduate from those schools and enroll in postsecondary education institutions in persisting in, and attaining a degree or certificate from, such institutions, through activities such as, but not limited to, mentorships, ongoing assistance with the financial aid application process, and establishing or strengthening peer support systems for such students attending the same institution; and**
- (iv) Propose one or more project-specific performance measures, including aligned leading indicators or other interim milestones, that will provide valid and reliable information about the applicant's progress in preparing students, including educationally disadvantaged students, for enrollment in postsecondary education institutions and in supporting those students in persisting in and attaining a degree or certificate from such institutions. An applicant addressing this priority and receiving a CMO grant must provide data that are responsive to the measure(s), including performance targets, in its annual performance reports to the Department.**
- (v) For purposes of this priority, postsecondary education institutions include institutions of higher education, as defined in section 8101(29) of the ESEA, and one-year training programs that meet the requirements of section 101(b)(1) of the Higher Education Act of 1965, as amended (HEA).**

Strengths:

The applicant is proposing to support the expansion of 56 expansion schools and 38 replication schools in the Rio Grande Valley, Austin, San Antonio, El Paso, Tarrant County (Fort Worth), Texas’ Permian Basin, and Houston; Southeastern Louisiana (New Orleans and East Baton Rouge), and Tampa Bay, Florida, adding a total of 30,886 new high-quality charter school seats. The applicant demonstrated the CMO has had much success with high school charters. For example, in 2017 almost 3 ½ times more IDEA students took AP tests than the state average (90.4% vs. 26.2%), and proportionally more students passed those AP tests than students across the state. For every 100 high school students IDEA enrolls, 90.4 took an AP exam in 2017 and 47.5% (or 42.9 students) passed at least one. Compare this with the state’s 26.2 students per hundred who tested and only 49.1% (or 12.8 students) passed. IDEA has adopted an “AP for All” approach that will see all students—100%—take 11 AP courses by the time they graduate. In addition to AP for All, five IDEA secondary schools also offer International Baccalaureate programming. (pgs. 46-47

Weaknesses:

No weaknesses noted.

Reader's Score: 3

Competitive Preference Priority 4 - Replicating/Expanding High-quality Charter Schools

1. Competitive Preference Priority 4— Replicating or Expanding High-quality Charter Schools to Serve Native American Students.

(i) Propose to replicate or expand one or more high-quality charter schools that--

(A) Utilize targeted outreach and recruitment in order to serve a high proportion of Native American students, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws;

(B) Have a mission and focus that will address the unique educational needs of Native American students, such as through the use of instructional programs and teaching methods that reflect and preserve Native American language, culture, and history; and

(C) Have a governing board with a substantial percentage of members who are members of Indian Tribes or Indian organizations located within the area to be served by the replicated or expanded charter school;

(ii) Submit a letter of support from at least one Indian Tribe or Indian organization located within the area to be served by the replicated or expanded charter school; and

(iii) Meaningfully collaborate with the Indian Tribe(s) or Indian organization(s) from which the applicant has received a letter of support in a timely, active, and ongoing manner with respect to the development and implementation of the educational program at the charter school.

Strengths:

The applicant is not responding to CCP 4.

Weaknesses:

The applicant is not responding to CCP 4.

Reader's Score: 0

Status: Submitted
Last Updated: 02/12/2019 05:11 PM

Status: Submitted

Last Updated: 02/12/2019 05:11 PM

Technical Review Coversheet

Applicant: IDEA Public Schools (U282M180022)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the eligible applicant		
1. Quality of the Applicant	45	45
Significance		
1. Disadvantaged Students	30	28
Quality of the Project Evaluation		
1. Evaluation Plan	10	10
Quality of the Management Plan		
1. Management Plan	15	15
Priority Questions		
Competitive Preference Priority 1		
Promoting Diversity		
1. Promoting Diversity	3	3
Competitive Preference Priority 2		
Reopening Poor-performing Public Schools		
1. Reopening Public Schools	3	3
Competitive Preference Priority 3		
High School Students		
1. High School Students	3	3
Competitive Preference Priority 4		
Replicating/Expanding High-quality Charter Schools		
1. Replicating/Expanding	3	0
Total	112	107

Technical Review Form

Panel #4 - CMO - 4: 84.282M

Reader #3: *****

Applicant: IDEA Public Schools (U282M180022)

Questions

Selection Criteria - Quality of the eligible applicant

1. Selection Criteria 1: Quality of the eligible applicant

Reader's Score: 45

Sub

1. (i) **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 served by other public schools in the State.**

Strengths:

The applicant's school student achievement percentages of students who meet or exceed standards outpaces the state in each of the targeted subgroups (e40). 45% of IDEA alumni complete a college degree within in 6 years as compared to rates of 13% in Texas and 9% nationally (e36). The applicant provides data that show higher attendance rates than the region and the state (e41). Although no comparison data exists, the applicant achieves high retention rates (86.7%) at its campuses (e42). Dropout rates at the applicant's current programs report 0% while the dropout rate in Texas is 2.2% (e42). The applicant's students meet college ready standards at 82% compared to 54.2% of Texas students (e44) and their students outperform the state in college graduation rates (e47).

Weaknesses:

There were no weaknesses observed in this section.

Reader's Score: 15

2. (ii) **The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation.**

Strengths:

IDEA charter schools have not had any closures nor revocations due to noncompliance, nor have they had any affiliations revoked or terminated, including voluntarily (e47). They provide documentation to support their sound operation.

Sub

Weaknesses:

There are no weaknesses in this area.

Reader's Score: 15

3. (iii) **The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter.**

Strengths:

The applicant's schools have had no significant issues in the area of financial or operational management or student safety (e48). They are able to access the Permanent School Fund bond program for which applicants must show three consecutive years of unqualified opinions on audits and receive an investment grade credit rating (e48). The applicant is able to issue debt in the bond market to secure funding for its facilities (e49).

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 15

Selection Criteria - Significance

1. Selection Criteria 2: Significance of contribution in assisting educationally disadvantaged students

In determining 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, the Secretary considers the following factors:

Reader's Score: 28

Sub

1. (i) **The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, particularly students with disabilities and English learners, at rates comparable to surrounding public schools or, in the case of virtual charter schools, at rates comparable to public schools in the State.**

Strengths:

The applicant serves a population that is more educationally and economically disadvantaged than Texas (e40).

Weaknesses:

Although the applicant's schools serve ELLs at a rate that is 75% higher than the state of Texas and 9% higher than the state of Louisiana (e27), they serve less ELLS and students with disabilities than some of its surrounding school districts (e26).

Reader's Score: 13

Sub

- 2. (ii) The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit, enroll, and effectively serve educationally disadvantaged students, particularly students with disabilities and English learners.**

Strengths:

IDEA locates its schools in high-need communities and educates a student body 96.5% minority, 87% economically disadvantaged, and 32.9% ELLs (e13). The applicant developed a voluntary desegregation plan which includes strategies for increasing diversity (e23). IDEA offers a “robust special education program” including programming specifically designed to focus on the strengths and abilities of students with disabilities (e26). The applicant uses multiple methods of recruitment to ensure a diverse student body as well as translating informational flyers in at least two languages. (e51). The applicant offers programming that is specifically designed with educationally disadvantaged students in mind, including early intervention for students at risk for special education (e52). IDEA’s ELL population is almost twice as high as the rest of the state (e52). The enrollment of educationally disadvantaged students has increased over the past 15 years (e54).

Weaknesses:

There are no weaknesses in this area.

Reader's Score: 15

Selection Criteria - Quality of the Project Evaluation

1. Selection Criteria 3: Quality of the evaluation plan for the proposed project

In determining the quality of the evaluation plan for the proposed project, 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 proposed project, as described in the applicant’s logic model, and that will produce quantitative and qualitative data by the end of the grant period.

Strengths:

The proposed evaluation plan is strongly linked to the logic model (e55). The evaluation plan measures the activities proposed in this application and includes examining whether supports are in place for expansion and that the models are implemented with fidelity (e55). The evaluation is partially based on external evaluations performed by SRT and Copia Consulting (e55). The applicant, using its own evaluation team, has developed rigorous high-quality evaluations (e56). The applicant has a dedicated evaluation team (e57). The applicant has developed research plans for achievement, growth, persistence, staff performance and training, and family experiences (e60). The applicant has developed a timeline for evaluation, with some reports coming quarterly, annually, and at the end of the grant period (e62). The applicant uses both quantitative and qualitative data to evaluate the program (e63).

Weaknesses:

There are no weaknesses in this area.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan

1. Selection Criteria 4: Quality of the Management Plan

In determining the quality of the applicant’s management plan, the Secretary considers the following factors:

Reader's Score: 15

Sub

1. (i) **The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model required under section 4305(b)(3)(B)(iii) of the ESEA (5 points). (NFP)**

Strengths:

The applicant has demonstrated that they have fiscally sound practices and sufficient management capabilities to sustain the program (e66). The applicant provides a multi-year financial model that demonstrates its ability to maintain the program after the grant expires; the plan shows how the programs will be fiscally solvent after 3 years (e73).

Weaknesses:

There are no weaknesses in this area.

Reader's Score: 5

2. (ii) **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. (34 CFR 75.210(g)(2)(i))**

Strengths:

The proposal includes a timeline with responsibilities and milestones (e75). The timeline is based on their experience in opening many schools and includes key project management activities as well as a 30-month prior to launch plan (e74). The applicant plans to provide regular updates to the board on progress toward the outcomes (e76).

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 5

3. (iii) **The qualifications, including relevant training and experience, of key project personnel. (34 CFR 75.210(e)(3)(ii))**

Strengths:

The applicant provides extensive information on key project personnel (e76). The Project Director has extensive experience overseeing large federal, state, and philanthropic awards (e76). Resumes for each of the key personnel are included.

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 5

Priority Questions

Competitive Preference Priority 1 - Promoting Diversity

1. Competitive Preference Priority 1— Promoting Diversity.

Under this priority, applicants must propose to replicate or expand high-quality charter schools that have an intentional focus on recruiting students from racially and socioeconomically diverse backgrounds, and maintaining racially and socioeconomically diverse student bodies in those charter schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant states an intentional focus on recruiting racially and socially diverse backgrounds (e23). The applicant plans to strategically locate the schools in areas that will help them achieve diversity and avoid racial isolation (e23). The school has increased racial diversity in its Austin schools by more than double (e24). The school employs strategies that have increased the number of students with disabilities at their programs (e26). The applicant employs different strategies in different regions attempting to create diversity that is based on the community's population. The applicant created a voluntary desegregation plan in 2016 to ensure that the school would be diverse (e23). Their strategies have increased African American enrollment by 163% (e24). The applicant has a training program for principals that focuses on maintaining a diverse staff (e25). The applicant has created programming that is supportive of student with disabilities and markets that programming to increase enrollment (e26).

Weaknesses:

There are no weaknesses in this area.

Reader's Score: 3

Competitive Preference Priority 2 - Reopening Poor-performing Public Schools

1. Competitive Preference Priority 2— Reopening Academically Poor-performing Public Schools as Charter Schools

Under this priority, applicants must:

(i) Demonstrate past success working with one or more academically poor-performing public schools or schools that previously were designated as persistently lowest-achieving schools or priority schools under the former School Improvement Grant program or in States that exercised ESEA flexibility, respectively, under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB); and

(ii) Propose to use grant funds under this program to reopen one or more academically poor-performing public schools as charter schools during the project period by--

(A) Replicating one or more high-quality charter schools based on a successful charter school model for which the applicant has provided evidence of success; and

(B) Targeting a demographically similar student population in the replicated charter schools as was served by the academically poor-performing public schools, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

Strengths:

The applicant has demonstrated success in turning around one its failing schools (e27). The applicant has been asked by a Texas superintendent to take over failing schools in his district (e28). The applicant indicates a strategy for replicating its model at a failing school and ensuring that the program is demographically similar to the current school (e29).

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 3

Competitive Preference Priority 3 - High School Students

1. Competitive Preference Priority 3— High School Students.

Under this priority, applicants must propose to:

- (i) Replicate or expand high-quality charter schools to serve high school students, including educationally disadvantaged students;**
- (ii) Prepare students, including educationally disadvantaged students, in those schools for enrollment in postsecondary education institutions through activities such as, but not limited to, accelerated learning programs (including Advanced Placement and International Baccalaureate courses and programs, dual or concurrent enrollment programs, and early college high schools), college counseling, career and technical education programs, career counseling, internships, work-based learning programs (such as apprenticeships), assisting students in the college admissions and financial aid application processes, and preparing students to take standardized college admissions tests;**
- (iii) Provide support for students, including educationally disadvantaged students, who graduate from those schools and enroll in postsecondary education institutions in persisting in, and attaining a degree or certificate from, such institutions, through activities such as, but not limited to, mentorships, ongoing assistance with the financial aid application process, and establishing or strengthening peer support systems for such students attending the same institution; and**
- (iv) Propose one or more project-specific performance measures, including aligned leading indicators or other interim milestones, that will provide valid and reliable information about the applicant's progress in preparing students, including educationally disadvantaged students, for enrollment in postsecondary education institutions and in supporting those students in persisting in and attaining a degree or certificate from such institutions. An applicant addressing this priority and receiving a CMO grant must provide data that are responsive to the measure(s), including performance targets, in its annual performance reports to the Department.**
- (v) For purposes of this priority, postsecondary education institutions include institutions of higher education, as defined in section 8101(29) of the ESEA, and one-year training programs that meet the requirements of section 101(b)(1) of the Higher Education Act of 1965, as amended (HEA).**

Strengths:

The applicant plans on adding nearly 21,000 High School seats (e30). They anticipate enrollments ranging from 47.1% to 85.1% economically disadvantaged students (e30). The applicant describes an instructional model that is designed to ensure that struggling students get back on track quickly and prepares them for post-secondary education (e30). Previous high school programs managed by the CMO have had a 100% acceptance rate to college (e31). The school provides 36 separate categories of activities to prepare students for college (e31). The school ensures that at least 90% of the students take AP classes, compared to 26.2% for the state (e31). The school assists with financial aid forms (e34). The applicant proposes to increase college level graduate rates for 4-6 year cohorts (e36) and includes college persistence metrics (e38).

Weaknesses:

There are no weaknesses in this section.

Reader's Score: 3

Competitive Preference Priority 4 - Replicating/Expanding High-quality Charter Schools

1. Competitive Preference Priority 4— Replicating or Expanding High-quality Charter Schools to Serve Native American Students.

(i) Propose to replicate or expand one or more high-quality charter schools that--

(A) Utilize targeted outreach and recruitment in order to serve a high proportion of Native American students, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws;

(B) Have a mission and focus that will address the unique educational needs of Native American students, such as through the use of instructional programs and teaching methods that reflect and preserve Native American language, culture, and history; and

(C) Have a governing board with a substantial percentage of members who are members of Indian Tribes or Indian organizations located within the area to be served by the replicated or expanded charter school;

(ii) Submit a letter of support from at least one Indian Tribe or Indian organization located within the area to be served by the replicated or expanded charter school; and

(iii) Meaningfully collaborate with the Indian Tribe(s) or Indian organization(s) from which the applicant has received a letter of support in a timely, active, and ongoing manner with respect to the development and implementation of the educational program at the charter school.

Strengths:

The applicant did not apply under this priority.

Weaknesses:

The applicant did not apply under this priority.

Reader's Score: 0

Status: Submitted

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