

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

Status: Submitted

Last Updated: 07/03/2017 09:41 PM

Technical Review Coversheet

Applicant: Brooke Charter Schools (U282M170001)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	45	42
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	25	20
Quality of the Evaluation Plan		
1. Evaluation Plan	10	10
Quality of the Management Plan and Personnel		
1. Management Plan/Personnel	20	20
Sub Total	100	92
Priority Questions		
Competitive Preference Priority		
Promoting Diversity		
1. CPP 1	3	3
School Improvement through Turnaround Efforts		
1. CPP 2	5	0
Sub Total	8	3
Total	108	95

Technical Review Form

Panel #1 - Charter Management Organization - 1: 84.282M

Reader #1: *****

Applicant: Brooke Charter Schools (U282M170001)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 42

Sub Question

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, as amended by the ESSA, attending the charter schools the applicant operates or manages.

Strengths:

The applicant has thoroughly demonstrated success in increasing academic achievement for all three K-8 campuses (Brooke Roslindale, Brooke Mattapan, and Brook East Boston) for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, as amended by the ESSA. For example, the applicant stated that over the last several years, Brooke scholars (89% are African American and Hispanic) have set a new bar for what is possible at an urban public school. The applicant provided documentation of academic achievement as evidenced by the 2015 PARCC assessments results, as Brooke Charter Schools was the highest performing school district in the entire Commonwealth of Massachusetts. In addition, Brooke East Boston had the highest overall growth among all Massachusetts schools; English Language Learner students at Brooke outperformed the Boston Public Schools and state average for ALL students; and special education students at Brooke outperformed the Boston Public Schools average for ALL students. In addition, the applicant provides information regarding national attention through status of portfolio member of the Charter School Growth Fund, (funds some of the highest performing charter networks in the nation) Brooke has been recognized for the extraordinarily strong achievements of its students relative to other Charter Management Organizations nationally. In 2015, among all school networks in the CSGF portfolio, Brooke had the highest differential between its students and students from the sending district, and the second highest differential in math. (pg. 5, e22)

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Weaknesses:

The applicant failed to provide number comparisons for students with disabilities to area schools. The applicant failed to provide the number of students being represented when calculating the percentages for areas of attainment. (Appendix G, p. e140)

Reader's Score: 12

Sub Question

- 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.**

Strengths:

The applicant demonstrated how students have exceeded the average academic achievement results for the State. The applicant provides evidence of academic achievement at all Brooke Charter Schools. The applicant provided a table that shows how impressive academic achievement of all Brooke students, on the 2016 and 2015 PARCC assessments, African American, Hispanic, and English Language Learner subgroups outperformed the general population in both the Boston Public Schools and the state of Massachusetts. Special education students at Brooke outperformed the general population in the Boston Public Schools on both the ELA and math PARCC assessment, as well as the state's general population on the math PARCC assessment. (p. 23) For example, in 2016 the percentage rate for All Students Scoring at Levels 4 and 5 on PARCC ELA and Math was 40% and 58% for ELA and 37% and 52% for Math, respectively. All of the subgroups for Brooke students (African American – 75%, 72%, Hispanic – 79%, 83%, SPED – 45%, 40%, ELL – 50%, 50 %) exceeded the percentage rate for Boston Public-All Students (40%, 37%) for all subgroups for ELA and Math, respectively. In 2016 Brook students exceeded the rate for Massachusetts-All Students (58%, 52%) in ELL and Math for African American, and Hispanic subgroups, respectively. In addition, the applicant indicates that attendance rates for Brooke ranged from 95.8% to 96.3% compared to state of Massachusetts rate of 94.8%, and 92.2% for Boston Public Schools for 2013-2014. The attendance continued to improve up through 2015-16 with attendance rates exceeding the rates of Boston Public Schools and Massachusetts. (pgs. 23, 24, e40, e41)

Weaknesses:

No weaknesses noted.

Reader's Score: 15

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

Strengths:

The applicant documented that the Brooke Charter Schools have operated for over 15 years without any significant issues in the area of financial or operational management; without any significant problems with statutory or regulatory compliance that threatened the renewal of any of charters; and have not had any significant issues with respect to student safety. The applicant indicates that all Brooke charters received renewal since 2002 at each charter renewal interval, and often with commendation. (pg. 27, e44)

Weaknesses:

No Weakness noted.

Reader's Score: 15

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**

Reader's Score: 20

Sub Question

1. **The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

Strengths:

The applicant indicates a strong commitment to serving students traditionally underserved by the Boston Public Schools that include low-income, African American, Hispanic, Special Education, and English Language Learner students. The applicant provides evidence of the demographics for the last several years of having a student population of 89 to 95 percent of students at Brooke being African American or Hispanic, which represents a higher percentage than the Boston Public Schools. In addition, the applicant indicates that each Brooke school enrolls students using randomized lotteries with preference given to student according to residency and sibling status. The lottery results for 2016 included 2,630 applications received, 180 open network seats, and waitlist of 2,450. The applicant documents the methods used to recruit students that include community outreaches (Head Start centers, WIC centers, faith-based institutions, and public libraries), mailers written in multiple languages. The applicant documents a thorough recruitment strategy, in regards to recruitment for ELL and special education students, the applicant states that Brooke Charter Schools serves all students to include those on IEP's and 504s, and adheres to the IDEA Act on all levels. The applicant states that approximately 70% of students at Brooke East Boston identify FLNE (First Language Not English) in comparison to 48% for Boston Public Schools. In addition, the applicant provides a detailed plan for serving all students to include special education and ELL students that includes research-based interventions. (pgs. 17, 28-38, e34, e45-e56) .

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Weaknesses:

When compared with the local district, ELL (district-30.3%, all schools-2.5%, 3.7%, 12%, 6.1%), and students with disabilities (district-19.6%, all schools-6.9%, 10%, 7.6%, 8.1%) in 2016 were not served at rates comparable to surrounding public schools (Appendix G - p e139-e140).

Reader's Score: 5

2. **The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.**

Strengths:

The applicant presents a thorough plan for recruiting and enrolling educationally disadvantaged students. For example, the applicant documented that the demographics for the Brooke schools grants access and enrolls historically underserved students, including families who are non-native English speakers. (p. 17, e34) Brooke Charter Schools is committed to serving those students traditionally underserved by the Boston Public Schools, including low-income, African American, Hispanic, special education, and English Language Learner students. The applicant proposes to expand to a K-12 pathway, students at Brooke High School will matriculate from the existing K-8 Brooke schools in Roslindale, Mattapan, and East Boston. As such, the students at Brooke High School will continue to reflect current student demographics at Brooke: 89% African American and Hispanic, students who qualify for free or reduced-price meals at Brooke. The applicant proposes to replicate the essential characteristics that have made the three current Brooke schools exceptionally effective and will transfer those essential beliefs to the new context of a high school as documented.

Sub Question

The applicant includes a detailed plan for delivery of instruction to include extended school day and year programs, AP courses, core graduation requirements for all students, SAT and AP as E-Goals, STEM and Coding, College-Reading Writing, Scope and Sequence. (pgs. 32-38, e49-e55).

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Quality of the Evaluation Plan

- 1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and 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 grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.**

Strengths:

The applicant expresses that Brooke's five-year expansion plan will include two primary goals to include academic achievement (college preparation, exceed closing achievement gaps) and growth by accomplishing fully enrollment at Brooke High School (serve 600 more students at high school level and 91 more students at K-8 schools) (pgs. 39, 40, e56, e57). The applicant provides a Logic Model for the proposed project purposed to determine the alignment of the evaluation plan to the logic model for the proposed grant project. The applicant provides a model that includes desired outcomes, baseline data, data collection, and narrative. The applicant provides a table with baseline data that is qualitative and quantitative in the areas of academic achievement, college success, culture, and finance. (pgs. 39-44, e56-61)

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan and Personnel

- 1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—**

Reader's Score: 20

Sub Question

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

Strengths:

The applicant provided a comprehensive management plan that demonstrated the project could meet proposed objectives on time and within budget, and includes clearly defined responsibilities, timelines and milestones for accomplishing the project tasks. The applicant provided detailed information in the narrative that provided milestones and timelines, and documented the specific person (s) responsible for each task for the proposed project. For example, the two co-directors for operations and academics, and high school principal will manage the five-year timeline, budget, resource development to ensure the successful launching of Brooke High School. (pgs. 44-48, e61-e66).

Weaknesses:

No weaknesses noted.

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Reader's Score: 5

2. **The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and**

Strengths:

The applicant provided thorough information that demonstrates that the key personnel that will provide project and financial oversight for the proposed project are qualified by education and experience to implement the tasks and effectively carry out the activities for the proposed project. The applicant provided roles and responsibilities for key staff (e.g., Co-Director for Academics, Co-Director for Operations, Network Director of Operations, Network Director of Science and Network Director of Computer Science, Principal). In addition, the applicant provided resumes/curriculum vitae that include the Co-Director, Co-Director and Founding Principal, Director of Network Operations, Finance Director, Chief Development Officer that align with the proposed Management Plan. (pgs. 52-59, e52-e76, Appendix, e79-e100)

Weaknesses:

No weakness noted.

Reader's Score: 10

3. **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 included in the applicant's response to application requirement (g).**

Strengths:

The applicant provides evidence that it has the resources to operate the project beyond the length of the grant. The applicant documents that by year five (FY 22), Brooke High School will be fully financially sustainable on per pupil public tuition reimbursements. The applicant proposes to ensure stability by growing Brooke High one-grade level of students and teaching staff each year up through all four grade-levels. Over the course of our growth, the functional network or central office team will not increase and will be sustainable on public tuition reimbursements by FY 22.

Sub Question

This stability will reduce per-student network support cost as the number of students served increase Brooke schools. (pgs. 56-58, e73-e75)

Weaknesses:

No weaknesses noted.

Reader's Score: 5

Priority Questions

Competitive Preference Priority - Promoting Diversity

1. This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).

Note: For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" (www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf).

Strengths:

The applicant documents that through the 2013-14 school year the Massachusetts Department of Elementary and Secondary Education defined a school's "low income population" as the percentage of students that qualified for the free or reduced priced lunch. For the last five years that MA DESE used this definition, Brooke enrollment had an average of 78% of low-income students (72.3%, 78%, 82.3%, 80%, and 77.8%). With this definition, in 2016-2017, Brooke qualifies for and participates in the National School Lunch Program (NSLP) under Provision 2 for having greater than 75% of its students being low-income. According to this definition, in 2016-2017, Brooke qualifies for and participates in the National School Lunch Program (NSLP) under Provision 2 for having greater than 75% of its students being low-income. . In addition, the applicant provides information regarding national attention through status of portfolio member of the Charter School Growth Fund, (funds some of the highest performing charter networks in the nation) Brooke has been recognized for the extraordinarily strong achievements of its students relative to other Charter Management Organizations nationally. In 2015, among all school networks in the CSGF portfolio, Brooke had the highest differential between its students and students from the sending district, and the second highest differential in math. (pgs. 2, 3, e19, e20)

Weaknesses:

No weaknesses noted.

Reader's Score: 3

Competitive Preference Priority - School Improvement through Turnaround Efforts

1. This priority is for applicants that both:
 - (a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and
 - (b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public schools during the project period, to do so by replicating a successful charter school model for which the applicant has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-

For purposes of this priority, academically poor-performing public schools may include, but are not limited to, persistently lowest-achieving schools, as defined in this notice and the final requirements for the School Improvement Grants (SIG) program under Title I of the ESEA (<https://www.federalregister.gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act>); and priority schools in States that exercised flexibility¹ under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department’s June 7, 2012 guidance entitled, “ESEA Flexibility,” at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education’s December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

Note: For applicants proposing to use CMO grant funds to replicate a high-quality charter school by restarting as a charter school one or more academically poor-performing public schools, the CMO’s proposed charter school must be newly created and operating under a separate charter and governance than the academically poor-performing public school.

Footnote 1: As of August 1, 2016, States may no longer exercise flexibility, except in the limited circumstances where they implemented interventions previously in priority schools under the SIG program. For additional information related to ESEA flexibility and interventions in priority schools, see section B of the Department’s June 29, 2016 guidance entitled, “Transitioning to the Every Student Succeeds Act – Frequently Asked Questions,” at <http://www2.ed.gov/policy/elsec/leg/essa/essafaqstransition62916.pdf>.

Strengths:

The applicant did not address this priority.

Weaknesses:

The applicant did not address this priority.

Reader’s Score: **0**

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Status: Submitted

Last Updated: 07/07/2017 04:20 PM

Technical Review Coversheet

Applicant: Brooke Charter Schools (U282M170001)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	45	42
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	25	20
Quality of the Evaluation Plan		
1. Evaluation Plan	10	10
Quality of the Management Plan and Personnel		
1. Management Plan/Personnel	20	20
Sub Total	100	92
Priority Questions		
Competitive Preference Priority		
Promoting Diversity		
1. CPP 1	3	3
School Improvement through Turnaround Efforts		
1. CPP 2	5	0
Sub Total	8	3
Total	108	95

Technical Review Form

Panel #1 - Charter Management Organization - 1: 84.282M

Reader #2: *****

Applicant: Brooke Charter Schools (U282M170001)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 42

Sub Question

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, as amended by the ESSA, attending the charter schools the applicant operates or manages.

Strengths:

The applicant demonstrates success in increasing academic achievement for all students and for each of the required subgroups of students attending the charter schools the applicant operates or manages. For example, students at Brooke had more students scoring a 4 or 5 on the state 2016 PARCC test in ELA (78%, 72%, 84%) and Math (76%, 69%, 89%) than students in the local district (ELA-40%, Math-37%) and the state (ELA-58%, Math-52%) (p14). Across subgroups, Brooke students outperform students at the local district and state levels. For example, in ELA 75% of African American students scored a 4 or 5 on the state test versus 29% in the local district and 40% in the state (p17).

Weaknesses:

The applicant provides percentage data, but does not indicate the number of students included in the calculation. Given marked levels of achievement above the state and local in math and ELA, raw data indicating the number of students in each percent may have provided greater clarity. For example, the applicant indicates that 50% of ELL Brooke students scored a 4 or 5 on the state test versus 20% in the local district and state without indicating if the 50% refers to 20 students or 200 students. Given 2016 data indicated the school served a relatively low percent of ELL students(2.5%-12%), raw data would have provided further context for performance information provided (appendix G-p e140).

Reader's Score: 12

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.

Sub Question

Strengths:

The applicant provides some data related to academic achievement. Achievement for student groups is high across PARCC assessment (p5, 13-23). For example, Brooke students, across its three sites, scored higher than the state average on the 2015 PARCC assessment for grades 3-8, outperforming all school districts and the highest percentage of students scoring at the top two levels of PARCC.

Weaknesses:

None noted

Reader's Score: 15

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

Strengths:

The applicant's current school is in operation and has a valid charter. The authorizer conducts annual site visits and annual data collection to ensure accountability and no significant issues were noted in the narrative. Moreover, the CMO has also successfully renewed its charter since 2002 (p27). Network staff provides support for the school in terms of facility, finance and compliance (p27-28), which provides an additional level of oversight for both school operational and programmatic supports.

Weaknesses:

None noted

Reader's Score: 15

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**

Reader's Score: 20

Sub Question

- 1. The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

Strengths:

The applicant currently operates a K-12 school and provides documentation that it demonstrates it serves some educationally disadvantaged subgroups at rates comparable to surrounding public schools. For example, three of the four campuses served more African American students (69%, 66.8%.53.7%) in 2016 than the local school district (appendix G-p e139-e140). The inclusion of enrollment/lottery practices that ensure transparency and broad outreach will also increase the likelihood that barriers to enrollment will be minimized (p29).

Sub Question

Weaknesses:

When compared with the local district, ELL (district-30.3%, all schools-2.5%, 3.7%, 12%, 6.1%), and students with disabilities (district-19.6%, all schools-6.9%, 10%, 7.6%, 8.1%) in 2016 were not served at rates comparable to surrounding public schools (appendix G-p e139-e140). Additional detail is needed to fully detail how these subgroups are enrolled in rates comparable to the local district.

Reader's Score: 5

2. The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.

Strengths:

The applicant has a sound plan to recruit and enroll educationally disadvantaged students. The merged K-12 campus will continue the network practices of direct mailings in multiple languages to families and visits to community centers, Head Start centers, WIC centers, faith-based institutions, public libraries, and various community-based organizations (p29). These efforts are reasonable for the recently added high school grades given the 2016 lottery had 2450 students on the wait list across all grades and students from the 8th grade will automatically be enrolled in the high school. Additional outreach through community centers, Head Start centers, WIC centers, faith-based institutions, public libraries, and various community-based organizations will likely reach other educationally disadvantaged students, including students with disabilities (p29). Given the services provided by these entities (academic, social, medical, civic), outreach to educationally disadvantaged students is likely.

Weaknesses:

No weaknesses noted

Reader's Score: 15

Selection Criteria - Quality of the Evaluation Plan

1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and 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 grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.

Strengths:

The methods of evaluation include objective performance measures clearly related to the intended outcomes of the proposed grant project. Methods will involve assessment of student progress (state tests), and transcript/student records review that are appropriate for the objectives are written. Objectives are primarily quantitative and clearly establish a benchmark for performance. For example, the annual student retention rate will be 90% or higher. The collection of some qualitative data is evident given the applicant's intent to assess the operating budget's declining dependence on private fundraising from 2017 to 2021. Clearly stating baseline data points and when data will be collected provides some guidance regarding how the plan will be implemented. (p38-44)

Weaknesses:

None noted

Reader's Score: 10

Selection Criteria - Quality of the Management Plan and Personnel

- 1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—**

Reader's Score: 20

Sub Question

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

Strengths:

The management plan is sound and will likely achieve the objectives of the proposed project on time and within budget. For example, the project will be appropriately staffed with an on-site high school principal, with supports from two co-directors (academics, operations), central office Director of Student Supports, and a Dean of Students. Network supports will also include finance, HR and legal support/oversight. The principal will be responsible for managing the project timeline and budget (p44-51). Network staff will facilitate data collection, management, and analysis in order to continuously inform and improve school operation (p59).

Weaknesses:

None noted

Reader's Score: 5

- 2. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and**

Strengths:

The identified project director, who also serves as the Network Director of Operations, is justified as project director in the narrative. She is knowledgeable of the target school as the network operations director, has a background in education, serves as chief procurement officer, and manages state and federal compliance related to charter renewal, enrollment, educator qualifications and public records. Additional support from the network is also helpful. (p52- 55)

Sub Question

Weaknesses:

None noted

Reader's Score: 10

- 3. 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 included in the applicant's response to application requirement (g).**

Strengths:

The applicant provides sound evidence that it will sustain the charter school after the grant has ended. The network has been in operation for 15 years and successfully operated four schools prior to expansion to high school. Charter renewal throughout the period for the prior schools occurred successfully and clean financial audit. (p55-57)

Weaknesses:

No weaknesses noted

Reader's Score: 5

Priority Questions

Competitive Preference Priority - Promoting Diversity

- 1. This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).**

Note: For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" (www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-2011111.pdf).

Strengths:

The applicant intends to use a focused mailing plan to ensure a diverse student body. Target mailing to diverse communities has proven successful in recruiting a diverse student body for each of its four campuses (p29).

Weaknesses:

No weaknesses noted

Reader's Score: 3

Competitive Preference Priority - School Improvement through Turnaround Efforts

- 1. This priority is for applicants that both:**

(a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and

(b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public

has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-performing public school at the time of restart are exempt from the charter school's lottery.

For purposes of this priority, academically poor-performing public schools may include, but are not limited to, persistently lowest-achieving schools, as defined in this notice and the final requirements for the School Improvement Grants (SIG) program under Title I of the ESEA (<https://www.federalregister.gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act>); and priority schools in States that exercised flexibility¹ under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education's December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

Note: For applicants proposing to use CMO grant funds to replicate a high-quality charter school by restarting as a charter school one or more academically poor-performing public schools, the CMO's proposed charter school must be newly created and operating under a separate charter and governance than the academically poor-performing public school.

Footnote 1: As of August 1, 2016, States may no longer exercise flexibility, except in the limited circumstances where they implemented interventions previously in priority schools under the SIG program. For additional information related to ESEA flexibility and interventions in priority schools, see section B of the Department's June 29, 2016 guidance entitled, "Transitioning to the Every Student Succeeds Act – Frequently Asked Questions," at <http://www2.ed.gov/policy/elsec/leg/essa/essafaqtransition62916.pdf>.

Strengths:

The applicant did not address this priority.

Weaknesses:

The applicant did not address this priority.

Reader's Score: 0

Status: Submitted
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Status: Submitted

Last Updated: 07/10/2017 03:46 PM

Technical Review Coversheet

Applicant: Brooke Charter Schools (U282M170001)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	45	42
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	25	19
Quality of the Evaluation Plan		
1. Evaluation Plan	10	8
Quality of the Management Plan and Personnel		
1. Management Plan/Personnel	20	18
Sub Total	100	87
Priority Questions		
Competitive Preference Priority		
Promoting Diversity		
1. CPP 1	3	3
School Improvement through Turnaround Efforts		
1. CPP 2	5	0
Sub Total	8	3
Total	108	90

Technical Review Form

Panel #1 - Charter Management Organization - 1: 84.282M

Reader #3: *****

Applicant: Brooke Charter Schools (U282M170001)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 42

Sub Question

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, as amended by the ESSA, attending the charter schools the applicant operates or manages.

Strengths:

The applicant provided data showing that the Students who are English Learners and the Students with Disabilities served outperform the state, and the narrative and tables describe that Brooke schools, in combination, outperform the aggregate state and Boston Public School data. This discussion begins on page e29. There are three years of data provided, and in 2014, 2015, and 2016, Brooke students across all three schools outperformed the Boston Public Schools and often the state average for all students. This demonstrates that increased achievement is being provided. The subgroups increased performance is described on e29. On e33, the application describes growth and improvement data. Specifically, from 2013 to 2014 on the state standardized assessment, 45% of students at Brooke

Roslindale scored Advanced on the ELA MCAS compared to 29% scored Advanced in 2013, and 57% of students at Brooke Roslindale scored Advanced on the math state standardized test, which was a 5% increase from 2013.

Weaknesses:

While the applicant provided some strong data, Brooke lagged the BPS economic disadvantage rates in 14-15, 15-16- 16-17, and by 12% in 16-17. The narrative describes that Brooke schools, in combination, outperform the aggregate state data, but demographic subgroup breakdowns by schools were not provided. Number comparisons for students with disabilities to area schools were not provided.

Reader's Score: 12

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.

Sub Question

Strengths:

Tables on e33 through 242 demonstrates that these students are outperforming district and state academically and on attendance. Attrition rates were comparable despite not being better . Specifically, the Brooke schools had an average of 3.3% attrition in 2016; whereas, the district had a rate of 8.8% and the state had a rate of 2.7%. The application provides specific numbers to support the claims that Brooke students are outperforming district and state on graduation and college entrance.

Weaknesses:

None noted.

Reader's Score: 15

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

Strengths:

They have not been closed or had any significant issues. They were allowed to renew. They were also allowed to expand even after the pause in charter expansions. This is described on page e44.

Weaknesses:

None noted.

Reader's Score: 15

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**

Reader's Score: 19

Sub Question

- 1. The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

Strengths:

The applicant described the academic performance of students with disabilities and students who were English Learners, which were strong .

This application was thoroughly discussed with respect to each selection criterion. My scores reflect my professional assessment of the application with respect to those criteria.

Sub Question

Weaknesses:

The applicant did not provide raw, comparative numbers for the individual Brooke Schools compared to the area schools in which they were located. They did not give these numbers for students with disabilities or students who were English Learners. Additionally, the suspension and expulsion data raised disproportionality concerns.

Reader's Score: 6

2. The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.

Strengths:

The applicant describes, beginning on page e46, multiple methods, including mailers, that are used to communicate about the school to the general area population. The applicant specifically describes that they will not discriminate against students with disabilities and students who are English Learners and will comply with the law. The applicant also describes outreach efforts specific to educationally disadvantaged groups, including the distribution of information and visits to community centers including libraries, Head Start centers, WIC centers, and faith based institutions. The application also describes that they purposefully send Spanish and Creole speaking representatives of the school engage families in venues frequently visited by high rates of non-native English speakers, and Brooke continues to produce applications and promotional materials in multiple, prevalent language

Weaknesses:

The application's narrative statement that they will not discriminate on the basis of disability is not the same as having marketing and outreach efforts specific to this historically educationally-disadvantaged group. The same applies to other subgroups, with the exception of students who are English Learners.

Reader's Score: 13

Selection Criteria - Quality of the Evaluation Plan

1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and 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 grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.

Strengths:

The application described multiple, important quantitative performance metrics, including growth/enrollment, academic performance/achievement, college entrance and success, attendance, and finance. For each metric, the table provides a desired outcome, baseline data, explanation for why the goal is achievable, and when the source for the data and when it will be collected. The tables of metrics begin on page e57.

Weaknesses:

The evaluation plan largely focused on lagging indicators, i.e. summative test data, and did not include interim data such as formative/interim assessments or other data that would be actionable during the school year. For example, on page e60, the row for student attendance describes that it will be collected annually for purposes of the evaluation, yet the baseline describes that there are data available daily. There was not description of how they would adjust upon interim evaluation. There was not any qualitative data such such as student engagement or parent perceptions and satisfaction. The evaluation plan was more of an accountability framework than an evaluation system. The plan did not look at known performance factors such as teacher performance and retention. The tables of metrics begin on page e57.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan and Personnel

1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—

Reader's Score: 18

Sub Question

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

Strengths:

The application provided a clear timeline for major milestones and reasonable roles for schools and central office. Key milestones are listed beginning on page e64, Table 18. Following the table, the narrative describes, starting on page e67 the financial personnel and controls that will mitigate financial risk.

Weaknesses:

The interaction and accountability between school leaders and the central office remain unclear. There were not clear communication and reporting requirements or lines of authority and responsibility. For example, the application describes on e65 that the co-director will jointly participate in classroom observations and will create important timelines. Yet, dual participation in all classroom observations is duplicitous and blurs lines on responsibility. Also, page e63 describes that "Brooke's Co-Director for Operations, Co-Director for Academics, and Brooke High School Principal will manage the five-year timeline, budget, and resource development necessary for successfully launching Brooke High." This raises similar concerns regarding clarity around roles and accountability.

Reader's Score: 4

2. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and

Strengths:

The resumes provided showed that key personnel had multiple years of diverse experience in education, business, and management. They begin on page e83. Specific examples include: Ms. Steadman who will be Co-Director for Academics. She holds a J.D. and M.Ed. from Harvard, and she has approximately 15 years of experience in education. The Co-Director for Operations, Mr. Clark, has been in education, whether K-12 or higher education, for 25 years. The other resumes are similarly strong.

Weaknesses:

The resumes did not include anyone with clear project evaluation experience, and the individual who was tasked already has many important responsibilities and thus questionable capacities.

Reader's Score: 9

3. 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 included in the applicant's response to application requirement (g).

Strengths:

The application provided a clear 5-year plan for becoming solvent based on state student tuition support alone. The application describes outreach and philanthropy and describes roles and responsibilities of key individuals who will work to execute the plan for sustainability after the grant ends. Projections can be found on e142. The outreach

Sub Question

and philanthropy and 5-year plan can be found on e76 . Appendix C, on page e101, has letters of support from potential funds.

Weaknesses:

There were not notable weaknesses.

Reader's Score: 5

Priority Questions

Competitive Preference Priority - Promoting Diversity

1. This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).

Note: For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" (www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf).

Strengths:

The applicant demonstrated with clear data its service to higher numbers of students of color compared to area schools, as well as similar but lower numbers of economically disadvantaged. The applicant also demonstrated that its racially and economically diverse student bodies had strong academic performance compared to area schools.

Weaknesses:

There were not notable weaknesses here.

Reader's Score: 3

Competitive Preference Priority - School Improvement through Turnaround Efforts

1. This priority is for applicants that both:

(a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and

(b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public schools during the project period, to do so by replicating a successful charter school model for which the applicant has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-performing public school at the time of restart are exempt from the charter school's lottery.

For purposes of this priority, academically poor-performing public schools may include, but are not limited to, persistently lowest-achieving schools, as defined in this notice and the final requirements for the School Improvement Grants (SIG) program under Title I of the ESEA (<https://www.federalregister.gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act>); and priority schools in States that exercised flexibility¹ under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education's December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

Note: For applicants proposing to use CMO grant funds to replicate a high-quality charter school by restarting as a charter school one or more academically poor-performing public schools, the CMO's proposed charter school must be newly created and operating under a separate charter and governance than the academically poor-

Footnote 1: As of August 1, 2016, States may no longer exercise flexibility, except in the limited circumstances where they implemented interventions previously in priority schools under the SIG program. For additional information related to ESEA flexibility and interventions in priority schools, see section B of the Department's June 29, 2016 guidance entitled, "Transitioning to the Every Student Succeeds Act – Frequently Asked Questions," at <http://www2.ed.gov/policy/elsec/leg/essa/essafaqstransition62916.pdf>.

Strengths:

The applicant did not address the school turnaround/improvement question.

Weaknesses:

The applicant did not specifically address school turnaround/improvement question.

Reader's Score: 0

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