

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

Status: Submitted

Last Updated: 07/29/2016 10:01 AM

Technical Review Coversheet

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	49
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	8
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	19
Quality of Project Evaluation		
1. Project Evaluation	10	9
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	4
Promoting Diversity		
1. CPP 2	3	0
Total	108	99

Technical Review Form

Panel #5 - Charter Management Organization - 5: 84.282M

Reader #1: *****

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Questions

Selection Criteria - Quality of the Eligible Applicant

In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 49

Sub Question

1.

Strengths:

The applicant establishes a track record of significantly increasing student achievement and attainment for all students, and for educationally disadvantaged students. BCSE students outperform local and statewide peers by 20-30 percentage points (page 18 and in Appendix F, pages e120-121), and 60% of 8th graders passed the NYS Regents High School Exams across multiple subjects (page 19 or page e125).

BCS has consistently received A's and B's on NYC DOE Progress Reports since 2008, was named a National Blue Ribbon Winner in 2012, and was identified as a Reward school in the 2015-2016 school year. The school was the highest performing charter in the state, and in the top five of all schools in the state (page 6).

The Connecticut school, SCSE, has not been open long enough to have tested grade levels on statewide assessments (the school has 168 students in grades PK-1). The applicant describes how the Developmental Reading Assessment is used to monitor literacy progress and Curriculum Based assessments are used to monitor Math progress (page 19 or e37). Data on Tables F.8 and F.9 show student growth at high levels. The applicant evidences a strong student performance monitoring system, high targets/expectations (80% proficiency), and strong results.

Weaknesses:

No weaknesses were found.

Reader's Score: 20

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been

Sub Question

Strengths:

The applicant responds to subsection (i). They demonstrate their success in closing historic achievement gaps by providing disaggregated student performance on NYS Math and ELA exams for three years on pages e122 -124. Data in Appendix F. show BCSE's subgroups outperform local district and state subgroup averages by wide margins (Table F.5 on page e123), consistently across three years.

The applicant writes that there are no achievement gaps greater than 10 percentage points, and in some instances, scholars with disabilities, and Hispanic and African American students had higher proficiency rates than the white student subgroup (page 20).

The applicant notes how they have exceeded targets for closing achievement gaps on the New York School Quality Snapshot (page 21).

Weaknesses:

The data in Appendix F show that there are within school achievement gaps between subgroups (e.g., between students with disabilities and other students, between ELL students and other students), and these gaps are large and lack a consistent pattern of improvement (page e123).

Reader's Score: 14

- 3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).**

Strengths:

The school enrolls a large population of educationally disadvantaged students, yet outperforms local and state averages on state assessments.

Attachment H. provides three-year attendance and attrition rates, and this data clearly shows the schools are exceeding state averages (pages e143 and 144).

The schools are K-8, thus graduation rates, and college enrollment and college persistence data is not attainable. However, the dedicated high school placement coordinator works with families to students into competitive high schools, and the applicant provides data showing success with this (page e42). The applicant also tracks matriculation to college, and notes the colleges and universities alumni attend (page 24). These efforts help inform the curriculum and instructional practices at the school, plus directly connect the services provided by the school to students' longer-term educational success.

Sub Question

Weaknesses:

No weaknesses were found.

Reader's Score: 15

Selection Criteria - Assisting Educationally Disadvantaged Students

1. **The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.**

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

Currently, the network has Bronx Charter School for Excellence (BCSE, opened in 2004, and recognized in 2012 as a Title 1 Blue Ribbon winner) and Stamford Charter School for Excellence (opened in 2015). BCSE 2 will be opening fall 2016. The proposal is to replicate and expand to seven elementary schools and two middle schools (page 2). This includes expanding enrollment at an existing school and expanding grade levels to create a middle school, and opening four new schools in New York, and one in CT - all to be in areas of high need.

The mission is to prepare students for competitive high schools and colleges. The applicant provides evidence that with supports provided, students, many of whom are or will be first generation college students, are transitioning to high quality, selective high schools and colleges on page 24 (e42).

The applicant plans to open only one new school each year in order to maintain quality (page 3).

The applicant demonstrates good understanding of the educational landscape and student needs of both communities. The applicant explains the significant achievement gaps for high needs students in the Connecticut district where their school is located (page 27).

The applicant plans to triple to number of high quality seats they are currently offering (from 941 to 2968, as noted on page 20).

The applicant describes educational strategies, including a focus on literacy, personalization, data analysis/progress reporting, and teacher collaboration (pages 30-31). Citizenship and values are also stressed, along with 16 Habits of the Mind (page 32).

The applicant explains how they will assure students receive a free and appropriate education (page 29). The data in Appendix F. (pages e122-124) show the organization's track record of success serving students with disabilities and ELL students. Table F.5 indicates that such students in the organization's New York school are outperforming similar students in the host district and the state by wide margins.

Weaknesses:

No weaknesses were found.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

- 1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.**

Strengths:

The applicant provides measurable goals and objectives for the project (pages 33-34). The timeline is provided in Appendix H. The scaling up plan can be found in Table H.19 (page e148).

Although the expansion is aggressive - tripling the number of students served - since the organization has been in place since 2004 and has managed a slow and careful expansion while increasing student outcomes, there is strong likelihood of successful management of project goals and objectives.

The organization has clear understanding of the best practices that have led to their strong academic and organizational results, and how those practices can be successfully replicated. Also, since the schools have waiting lists, there is good likelihood that they will meet enrollment goals (page e23).

The applicant has already gained approval to open three more schools in the next three years in New York (page e21). The applicant provides good evidence that they have familiarity with the needs of the student population to be served with the expansions.

Weaknesses:

The staff member responsible for overseeing the project design goal is not specified. The applicant explains that the measures used to assess academic performance are set forth in the charter – which is not visible to this reader. More detail on the project design goals would be helpful.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan & Personnel

The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-

Reader's Score: 19

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 (4 points).**

Strengths:

The applicant provides a clear explanation of the staffing model and responsibilities (page 35 and Appendix H).

The majority of the replication schools identified to open in the next five years have already been approved (page 36). A Project plan, with tasks, milestones, timeframes and responsible party is provided on pages 37-39. The CMO takes careful time to vet locations/build local relationships (24 months) and opens one school at a time. The CMO is responsible for identifying facilities, as well as the charter contract, fundraising and initial human capital. The applicant demonstrates good knowledge of the tasks needed to successfully launch new schools. The CEO will act as project manager (page 39).

Clear definition of the roles and responsibilities of the CMO and of the schools is found in Attachment H, pages e150-151. The budget narrative describes the costs needed to meet project objectives (pages e155-161).

The applicant demonstrates good potential to manage the project well, and achieve objectives within time and on budget.

Weaknesses:

No weaknesses were found.

Reader's Score: 4

- 2. The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Strengths:

The applicant describes a wide range of activities to ensure the quality and performance of the new schools (pages e58-64).

The applicant is in process of creating a replication "kit" (page 40) to document policies, procedures and practices. The applicant commits to programmatic audits (including fiscal health, parent satisfaction and school safety) to monitor formative progress, and will attend school board meetings. Progress toward academic and non-academic goals will be monitored monthly (page 40). Authorizers will conduct periodic site visits, and other audits, such as financial audits, will occur regularly (pages 41 and 50). The applicant describes the governance structure (page 46).

Financial management and fundraising are strong (pages e65-67).

Weaknesses:

No weaknesses were found.

Reader's Score: 4

Sub Question

3.

Strengths:

Schools will reach financial sustainability by year four, and the network will reach financial sustainability in year seven (page 47). School finances, grants management, and federal funds will be centrally managed.

The applicant is contracting with Charter School Business Management Inc. (page 49), which has a solid reputation for charter school business services. The Charter School Growth Fund has approved a multi-million dollar contribution and philanthropic support from several foundations is noted (page 48). Additionally, the organization will hire a full time Director of Development (page 49).

Evidence of broad support was found in letters from the SUNY Charter Schools Institute, Northeast Charter Schools Network, Big Wood Foundation, Peter and Carmen Lucia Buck Foundation, Charter School Growth Fund, NYS Assembly 85th District, NYC Council 15th district, Parish of Our Lady of Solace, and the Van Nest Neighborhood Alliance.

Additionally, the applicant has actively shared out best practices with charter and district schools alike. This builds a supportive and collegial network, and demonstrates the applicant's desire to increase educational quality widely (page e23).

Weaknesses:

No weaknesses were found.

Reader's Score: 4

4. **The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

The applicant describes ongoing monitoring and intervention process, and also explains that if any school does not meet high standards despite intervention, the Board and the CMO may decide the best option is closure (page 50). The CMO has established a Dissolution Plan to assure full coordination of closure activities and transfer of the school's obligations (page 50).

Weaknesses:

Although the applicant references a plan, it was not included, thus not viewable. More detail on how families will be notified and processes related to closure activities (e.g. assisting students to transition to high performing schools, student records, dispersal of school resources, etc.) would be helpful.

Reader's Score: 1

5. **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 (6 points).**

Strengths:

Leaders have a combined 65 years experience in education (page 50). [REDACTED] spearheaded a successful turnaround of the original school and turned it into the highest performing K-8 non-magnet school in the state of New York. She earned a doctorate in education from Pennsylvania's Graduate School of Education in 2016 [REDACTED].

Sub Question

Staff have extensive classroom and academic experience. The person that will head Operations was a compliance officer for the NYC Department of Education, and has been a trial attorney. The applicant provides evidence that personnel have strong business and finance skills and experience.

Since staff have been involved with careful expansion efforts over the past years, their ability to manage the size and scope of this project seems reasonable.

Weaknesses:

No weaknesses were found.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

- 1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.**

Strengths:

The applicant describes internal and external evaluation strategies (pages 53-61). Evaluation components, including rigorous and measurable objectives, evaluation activities, and the quantitative and qualitative data to be collected and who will collect the data are well described. The applicant also describes how they will evaluate teachers. The applicant lists clear and attainable goals for student academic and school outcomes (pages 57-58) with largely public data sources, and the timelines for various audits/data collections/reports are clear. Quarterly audits will inform practices (pages e74-79).

Weaknesses:

It is not clear who is ultimately responsible for Project Evaluation or how evaluation findings will be compiled in summative reports and shared.

Reader's Score: 9

Priority Questions

Competitive Preference Priority - Supporting High-Need Students

This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (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 (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones. The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

The applicant writes to (b) School Improvement. BCSE participated in a three-year state-funded partnership to help a local priority district school (2013-2016). They have submitted a proposal to do collaborative school improvement work with a second district school, and are seeking to become a New York State Independent Receiver – which would allow them to work with or manage priority schools that have been in the most severe accountability status (page 7). The communities the applicant has targeted for expansion have several priority, struggling, persistently struggling and persistently dangerous schools (page e26).

The Project Lead has several published several articles and presentations on charter-district collaborations, and best practices in charter school management, and has had successful experiences turning around low performing schools (see resume in Appendix B-4).

Weaknesses:

No weaknesses were found.

Reader's Score: 4

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --

- (a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;
- (b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and
- (c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

No strengths were found.

Weaknesses:

While the applicant has many strengths for this competitive priority, the data show that the school in CT is more racially and economically segregated than nearby schools (89.9% African American/Hispanic verses the district's 57.3%, and 73% low-income students in the network school verses the district's 52%, as noted on page e29 and Appendix H).

Additionally, the percentage of students with disabilities served at the Bronx location is lower than the district average by half (page 13). Although the applicant notes this may be attributable to differences in how students are identified as in need of special education services, the data does not show that the school serves students with disabilities at comparable rates (page e30).

The network's 7.4% ELL rate is much lower than the 21% rate for the Bronx and 16% for Stamford (page 14).

Reader's Score: 0

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Technical Review Coversheet

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	50
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	6
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	18
Quality of Project Evaluation		
1. Project Evaluation	10	10
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	4
Promoting Diversity		
1. CPP 2	3	0
Total	108	98

Technical Review Form

Panel #5 - Charter Management Organization - 5: 84.282M

Reader #2: *****

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 50

Sub Question

1.

Strengths:

The applicant demonstrates it is increasing achievement for all students served, including educationally disadvantaged students. This can be found in Appendix F, which outlines student performance over a three year period. Specifically, the school outperforms the state and district with passing rates between 85 and 100 percent. The school received high marks on its renewal report, outlining how it continually met all accountability measures (e37).

Weaknesses:

No weaknesses noted.

Reader's Score: 20

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been significant achievement gaps between any of the subgroups of students described in section 1111 (b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant and to which significant gains in student academic achievement have been made with all populations of students served by the charter schools operated or managed by the applicant (15 points).

Strengths:

Appendix F provides specific data which demonstrates consistency among the group of students it serves each year, including students with disabilities (e41). Table F.6 provides disaggregate data for math over a three year period (Appendix F-5). The data on this chart outlines student performance and indicates no significant gaps when compared to the district and state performance. For example, during the 2014 school year, 100% of the students with disabilities were proficient, while 12% of the host districts' students with disabilities scored proficiency in

Sub Question

comparison to the state's measure of 16% proficiency (Appendix F-5).

Weaknesses:

No weaknesses noted.

Reader's Score: 15

- 3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).**

Strengths:

The applicant achieves strong results consistently with all groups of students served. For example, Appendix F outlines how the school is performing at a higher rate than the local districts. In 2015 on the ELA assessment, FRLP students in grade 3 demonstrated 26% proficiency while the host district reflected 20% proficiency and the state reflected a 21% proficiency respectively (e123). Appendix H-7 outlines how student attendance rates are around 90%, which is also higher than the surrounding district.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.**

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

The applicant plans to locate its schools in areas where the vast majority of the schools are classified as failing or priority (e44). Specifically, current and future sites for the schools are listed as 12 schools with failing/priority identification status. Table H.5 in Appendix H outlines the diverse student populations served, and indicates how the school populations are similarly diverse, and in most cases higher than its surrounding district. The school differentiates for all students, inclusive of students with disabilities to address all student needs (e48).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

1. **The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.**

Strengths:

Applicant provides a brief synopsis of its project, goals, objectives, and outcomes on pages e51. The outcomes outlined in the brief synopsis appear specific, attainable, and measurable. For example, to ensure meeting projected enrollment, Table H19 outlines the growth plan inclusive of the number of seats for each replicated school (e148).

Weaknesses:

While the applicant intended to provide an expanded plan with specific and measurable outcomes, the material provided in Appendix H, specifically H22, does not contain clear, measurable, and specific goals. Continuing to develop the plan to include responsible staff members, as represented on pages e51-52, would be beneficial in determining if the applicant understands the magnitude of the project and can deliver based on a solid well thought out plan.

Reader's Score: 6

Selection Criteria - Quality of the Management Plan & Personnel

The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-

Reader's Score: 18

Sub Question

1.

Strengths:

To ensure success of the expansion plan, the applicant has established different phases for roll out (e53-54). While contractors are relied on initially, as the program builds capacity and hires additional staff contractor roles decrease. The CMO assists the schools in its portfolio by operating under 3 specific domains: academics, operations, and finance (e53). The CMO also has a section specifically devoted for development of the projects (e53). Appendix H (H22) provides the specific roles and responsibilities for all members involved in the project. Pages e55-57 provides the timeline with specific dates for key activities detailing the team/person responsible for completing such task. While referenced on page e58, the applicant has yet to develop its replication toolkit.

Sub Question

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 2. The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Strengths:

Page e58 references a toolkit being developed to codify policies and procedures for effective replication. The school will conduct audits of its academics and report progress to its authorizer for evaluation (e59). The applicant will use data to determine its progress at every stage and make adjustments accordingly (e58-62).

Weaknesses:

While the applicant is developing a toolkit, it has yet to solidify this process and no materials were provided. The only reference to successful replication experience is the past replicated schools. Providing the actual toolkit would be beneficial in determining if the applicant has the capacity to continue such replication.

Reader's Score: 3

- 3. A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders critical to the project's long-term success (4 points).**

Strengths:

11 letters of support were included in Appendix C to demonstrate evidence of support. The budget provided in Appendix G provides the plan for growth aligned to the schools current and projected financials. The financial plan provided includes a gradual shift of responsibility from external contributors to the CMO, once capacity and staff are built (e67). The school has support from the Charter School Growth Fund and other philanthropic support for expansion purposes over several years (e66).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 4. The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

The school has an established Dissolution plan and intervenes based on data provided throughout the school year (e68).

Weaknesses:

While there is mention of the Dissolution Plan, the document is not provided with the proposal to determine the effectiveness of such developed plan (e68). Additionally, no specifics were provided about the plan referenced (e68).

Sub Question

Reader's Score: 1

5. **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 (6 points).**

Strengths:

The key personnel assigned to the project demonstrate tenure with the school and experience managing large projects (e70). Appendix B includes resumes of those who will be responsible for implementing the proposed plan. For example, the CEO of the organization has extensive school experience and expertise in growth and development of projects (e86-90).

Weaknesses:

No Weaknesses noted.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

1. **The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.**

Strengths:

The applicant will employ internal and external evaluations to ensure the intended outcomes of the project are met (e71). Additionally the objectives provided are rigorous indicating high attainment rates above 85) in all categories (e71-72). The plan outlines specific goals for success and includes measuring in academics, finances, and governance and making adjustments as needed (e71-79).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Priority Questions

Competitive Preference Priority - Supporting High-Need Students

1. **This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.**

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (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 (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones. The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

The proposed applicant wrote specifically to competitive preference 1(b) school improvement, as prior to 2007 the school struggled to meet performance objectives (e24). In 2012 the school received a national Blue Ribbon Award as an Exemplary High Performing School" and remains in good standing with its authorizer (e25). Additionally, the school participated in a partnership funded by the state to share best practices with struggling school districts (e25).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --

- (a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;
- (b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and
- (c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing

policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

No strengths noted.

Weaknesses:

While the school attracts a specific population of students, no specific marketing or enrollment strategies have been established for the economically disadvantaged student (e27).

Reader's Score: **0**

Status: Submitted
Last Updated: 08/01/2016 05:34 PM

Status: Submitted

Last Updated: 08/02/2016 01:33 PM

Technical Review Coversheet

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	46
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	8
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	19
Quality of Project Evaluation		
1. Project Evaluation	10	10
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	4
Promoting Diversity		
1. CPP 2	3	0
Total	108	97

Technical Review Form

Panel #5 - Charter Management Organization - 5: 84.282M

Reader #3: *****

Applicant: The Friends of the Bronx Charter School for Excellence, Inc. (U282M160032)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 46

Sub Question

1.

Strengths:

The applicant demonstrated its success in increasing student achievement by presenting its student academic performance for the past three years (pp. e120-121). On NY ELA and Math state assessment, for each of the past three years, students in Bronx Charter Schools for Excellence (BCSE) consistently outperformed their peers in the host district and NYS Public Schools respectively. The same performance trend applied to the performance of educationally disadvantaged students including low-income, students with disabilities, and ELLs (p. e23).

The proficiency rates for 3rd - 8th grades on the state assessment increased every year for the past three years.

Weaknesses:

In analyzing the submitted data, the proficiency rates on ELA fluctuates from 2013 to 2015 with 44.9, 51.75, and 46.8 in 2013, 2014, and 2015 respectively, which indicated inconsistency in increasing student achievement.

Reader's Score: 18

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been significant achievement gaps between any of the subgroups of students described in section 1111 (b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant and to which significant gains in student academic achievement have been made with all populations of students served by the charter schools operated or managed by the applicant (15 points).

Strengths:

For the past three years, the subgroup students in BCSE consistently outperformed their peers in the host district and NYS Public Schools respectively (p. e23). Disaggregated supportive data are evident in the district and state

Sub Question

comparisons reports (pp. e123-124). Using the performance of low-income students on ELA as an example, the gaps between the low-income students and all students have been consistently closing till in 2015, the subgroup students outperformed all students in the network.

Weaknesses:

In analyzing the performance gaps between students with disabilities and all students, the gap persists in all subjects for the past three years. The same trend applied to the gaps between ELLs and all students (p. e122).

Reader's Score: 13

- 3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).**

Strengths:

The applicant demonstrated its success in achieving the results by presenting student performance data on NY ELA and Math state assessment for the past three years. The low-incomes students, students with disabilities, and ELLs in BCSE consistently outperformed the same groups of students in the host district and NYS Public Schools respectively (pp. 123-124). The average daily attendance rates of BCSE were consistently higher than the state average for each of the past three years (p. e143). Since it is the first year that BCSE has high school graduating class, high school graduation rate and college attendance rate are not available yet.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.**

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

The applicant demonstrated its prior success in improving academic performance for educationally disadvantaged students including students with disabilities and ELLs by presenting their academic performance reports for the past three years (pp. e123-124). The educationally disadvantaged students consistently outperformed their similar groups of students in the host districts and the state average respectively. In addition, the applicant presented its educational approach to assist such groups of students in meeting the academic expectations, such as maximizing each individual's potential, using integrated co-teaching and grade cohort model for instructional delivery, etc. (pp. e42-51). The strategies

of ensuring the academic success of ELLs are proposed and explained (pp. e31-33). These approaches are likely to assist educationally disadvantaged students in meeting the academic standards.

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

- 1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.**

Strengths:

The applicant proposed project goals, objectives and outcomes which are measurable. For example, to grow the BCSE network of schools, BCSE schools will accommodate its total enrollment target of 2,968 scholars by school year 2020-21 across 7 elementary schools and 2 middle schools (p. e52). These objectives are clearly specified and attainable.

Weaknesses:

Some of the academic objectives are general and can be more specific. For example, "each school will achieve, or minimally make annual progress towards the academic accountability performance goals set forth in its charter" (p. e52), "the academic accountability performance goals" can be more specific; for example, the applicant could measure by certain percentages of students passing the state assessment.

Reader's Score: 8

Selection Criteria - Quality of the Management Plan & Personnel

The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-

Reader's Score: 19

Sub Question

1.

Strengths:

The applicant presented a sound management plan with tasks and activities to be conducted, milestones for accomplishing the tasks within the specified timeline, and person accountable for completing the tasks (pp. e52-57).

Sub Question

The applicant demonstrated its thoughtfulness in planning to open one school at a time. In addition, the applicant provided the CMO organizational and school-based organizational charts to demonstrate its management structure to achieve the objectives (p. e149). The CMO staff operates under three domains of Academics, Operations, and Finance to support the success of the project implementation (p. e53).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 2. The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Strengths:

The business plan provided is strategically sound. The plan includes several measures to monitor the performance of charter schools in the areas of academic performance, organizational and fiscal health, parent satisfaction, and school safety. Reports on academic, organizational, and fiscal performance will be submitted to the board for review on a monthly basis (p. e58). In addition, external audits will be conducted such as periodic authorizer's site visits (p. e59). An Improvement plan will be developed and revised at the end of the year based on student assessment data collection and analysis (p. e60). The leadership team will provide ongoing support and individualized professional development for continuous improvement (p. e61). The above are some examples demonstrating the sound management plan that the applicant implements for the sustainability of the project beyond its initial period of Federal funding.

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 3. A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders critical to the project's long-term success (4 points).**

Strengths:

The applicant provided a detailed comprehensive financial and operating model evident in the supplemental organizational budgets and financial information (pp. e129-137). For example, the central office will provide continual fiscal oversight to ensure the alignment of each school's budget with the school's programming and specific needs. A broad support from stakeholders is evident through the presentation of Letters of Support (pp. e99-114) to demonstrate a commitment of current and future partners ensuring a long-term success of the project.

Weaknesses:

No weaknesses noted.

Sub Question

Reader's Score: 4

- 4. The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

The CMO actively monitors each school's progress towards meeting its benchmarks throughout the school year (p. e68). In the event of school closure which the CMO expects unlikely to occur, the applicant has established a Dissolution Plan to guide the closure process to ensure the smooth transfer of all school's obligations (p. e68)

Weaknesses:

The Dissolution Plan is not included in the application for review. A quality dissolution plan should include, but are not limited to, the procedures and protocols to support school closure such as student record transferring, parents, students, and public notification, school's obligation transferring, assets disposition, etc. The quality of school closure plan cannot be determined if the Dissolution Plan is not submitted.

Reader's Score: 1

- 5. 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 (6 points).**

Strengths:

The qualifications of the key leadership team as well as their resumes are evident in the application (pp. e68-71 & e85-98). Their experiences and trainings bring a broad expertise in operating charter schools, which are likely to contribute to the success of the project. Their experience and participation in a state Dissemination Grant will be more likely to contribute to the success in managing the size and scope of this project (p.e25).

Weaknesses:

No weaknesses noted.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

- 1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.**

Strengths:

The applicant developed a comprehensive project evaluation plan including both internal and external evaluations to measure the performance and progress toward its goals and objectives. The evaluation components, measurable objectives, activities, and data to be collected are well specified (p. e71). Both quantitative and qualitative data will be collected and analyzed. Data source including methods of analysis and rationale is well defined (p. e76).

Annual audits are conducted to evaluate the performance of each school in the areas of academic, operation and financial health (p. e67). The CMO actively monitors the progress of each school throughout the year based on data collection and analysis. The leadership team provides support and technical assistance for underperforming schools if any.

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Priority Questions**Competitive Preference Priority - Supporting High-Need Students**

1. This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (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 (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones. The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

(b)

Bronx Charter School for Excellence (BCSE) managed by the CMO (p. e20) received the US DOE's highest accolade as a 2012 recipient of the National Blue Ribbon Award in the category of "Exemplary High Performing Schools" (p. e24). BCSE also received a state-funded Dissemination Grant to share best practices and resources for improved literacy instruction in a local priority struggling district school (p. e25). As the CMO evolved from the success of its anchor school, it is committed to collaborating with district or non-public peer schools to share best practices and afford all families with high quality educational options, regardless of their child's school of enrollment (p. e26). The applicant proposed to replicate its model in historically underserved New York City borough of the Bronx and Stamford, CT identified as a Priority and Alliance School District due to persisting achievement gaps (p. e35).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --

- (a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;
- (b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and
- (c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

No strengths noted.

Weaknesses:

The applicant is committed to attract, enroll, and retain a diverse population of learners to promote diversity (p. e29). The applicant presented current student enrollment of 84.4% Hispanic or African American students, 7.4% ELLs, and 10.1% students with disabilities (p. e27). Based on the additional enrollment data (p. e142), the applicant serves a lower rate of students with disabilities and ELLs comparing to the state average.

Reader's Score: 0

Status: Submitted

Last Updated: 08/02/2016 01:33 PM