

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

Status: Submitted

Last Updated: 07/17/2017 12:07 PM

## Technical Review Coversheet

Applicant: IDEA Public Schools (U282M170025)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
1. Quality of Applicant	45	42
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	22
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	10
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	18
<b>Sub Total</b>	<b>100</b>	<b>92</b>
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	3
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	<b>8</b>	<b>3</b>
<b>Total</b>	<b>108</b>	<b>95</b>

# Technical Review Form

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

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

Applicant: IDEA Public Schools (U282M170025)

## 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 maintained high graduation rates and, despite a minimal dip in rates for special education and ELL student graduation rates during the 2014-15 school year, has demonstrated overall growth in graduation rates across subgroups from the 2014 school year to the 2016 school year (pg. e529-531). Educationally disadvantaged and ELL students showed growth in reading and math on STAAR assessments from 2014 to 2016 (pg. e50).

#### Weaknesses:

Only three years of data are provided for graduation rates and assessment results (pg. e50, 529-531). 2014-16 STAAR results show that the performance of students with disabilities has decreased in reading and math from 2014 to 2016 (pg. e50).

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.

#### Strengths:

2016 STAAR assessment results show that special education, economically disadvantaged, and ELL students performed better than state averages in each assessed subject (pg. e45). Additionally, with respect to each relevant subgroup, 2016 data showed higher attendance rates, lower dropout rates, compared to state data, and higher graduation rates compared to state averages (pg. e531). The Applicant also had lower mobility rates compared to the state average for school year 2014-15 (pg. e536). Additionally, the Applicant sends significantly more students to college on average than the state (91.4% compared to 57.5% in 2013-14), and more students go on to complete a college degree within six years of enrollment when compared with the state and the national average for low-income students (pg. e42, 44).

**Sub Question**

**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 reports that it has never had any schools closed, charters revoked, any statutory or regulatory compliance issues, had any student safety violations or issues, or had any operational mismanagement (pg. e46).

**Weaknesses:**

No weaknesses 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: 22**

**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:**

On average, the Applicant serves higher or comparable rates of ELL and Economically Disadvantaged students as compared to the surrounding public schools (pg. e47).

**Weaknesses:**

Across all regions, the Applicant serves fewer Special Education students when compared to the local districts (pg. e47).

**Reader's Score: 7**

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 details specific initiatives designed to recruit and provide information to families of students with disabilities and plans to locate in targeted communities with high poverty rates and evidence of low performing neighborhood schools (pg. e48, 51). The Applicant provides a marketing plan which details the specific recruiting and outreach techniques used by the Applicant to reach educationally disadvantaged students (pg. e249).

**Sub Question**

**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 included a logic model which aligns to the evaluation plan (pg. e57, 570). The logic model includes clear goals and objective performance measures which relate to the intended expansion (pg. e57, 570). The inputs and outputs are specific and defined, and the evaluation plan will produce both quantitative and qualitative data by the end of the performance period (pg. e570).

**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: 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 management plan defines the responsible teams, general timelines, and major milestones for accomplishing project tasks, demonstrating that an overall plan for the expansion has been developed (pg. e64-65, 599-601). The major activities defined by the management plan apply to all new schools and date back 30 months prior to launch (pg. e64-65).

**Weaknesses:**

The management plan does not detail how the objectives will be completed on time as there are only launch dates for key activities and not due dates, nor does the management plan include any major activities relating to financial oversight to demonstrate how the project will be completed within budget (pg. e64-65, 599-601).

**Reader's Score: 3**

## Sub Question

- 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's VP of Financial Planning will serve as the project director; this individual currently manages the 2014 and 2016 CSP grants, which demonstrates experience in managing project of this size (pg. e66). The other key project staff identified by the Applicant, including the Co-Founder and Superintendent, come with a variety of specialized experience and most of whom have been part of the Applicant's prior expansions (pg. e67-69, 92).

### **Weaknesses:**

No weaknesses 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:**

Start-up schools receive critical operational and instructional support from the CMO, which includes support with facilities acquisition; recruiting school personnel; providing ongoing academic, financial, and operational support; and ensuring effective governance and oversight (pg. e69-70). The resource-sharing that is made possible by the CMO appears to help to ensure proper oversight and financial management (pg. e77-78). Although new schools operate on a deficit initially, most new schools reach funding solvency in its third year after opening (pg. e80). The Applicant has a proven history of successfully raising supplemental funds, and has raised nearly \$75 million from various identified investors (pg. e80, 465). In addition, the June 2016 budget shows a surplus of over \$22 million (pg. e464).

### **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](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).**

### **Strengths:**

The Applicant currently serves high rates of Hispanic students (93% on average) but recognizes the benefits of racial and socioeconomic integration (pg. e23). As part of its expansion plans, the Applicant intends to diversify its population by carefully and strategically selecting facility sites that would lend to more diversity (pg. e24). The Applicant identifies specific locations within mixed-income neighborhoods (pg. e24). The Applicant has had demonstrated success in this approach (pg. e25-26). Lastly, the Applicant actively focuses on diversifying its staff to better reflect the communities served (pg. e26).

**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-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 flexibility<sup>1</sup> 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](http://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:**

Not answered by Applicant.

**Weaknesses:**

Not answered by Applicant.

**Reader's Score:** 0

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**Status:** Submitted  
**Last Updated:** 07/17/2017 12:07 PM

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## Technical Review Coversheet

Applicant: IDEA Public Schools (U282M170025)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
1. Quality of Applicant	45	45
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	23
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	10
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	18
<b>Sub Total</b>	<b>100</b>	<b>96</b>
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	3
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	<b>8</b>	<b>3</b>
<b>Total</b>	<b>108</b>	<b>99</b>



# Technical Review Form

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

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

Applicant: IDEA Public Schools (U282M170025)

## 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: 45

#### 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 proposal shows that IDEA students are performing higher on the state standardized tests over time as well (p. 17). The proposal also shows that students are showing growth in graduation rates (p. 14).

#### Weaknesses:

No weaknesses noted.

Reader's Score: 15

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 proposal shows that educationally disadvantaged groups are performing higher than comparable groups at the state level. For example, the table on page 19 shows how the educationally disadvantaged sub-groups are attending school more regularly than the state numbers. Moreover, the proposal shows that the performance of economically disadvantaged and EL students are predominantly higher than the state's overall scores. (p. 25 & appendix g).

#### 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

#### Sub Question

**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 proposal states that IDEA currently operates charter schools in multiple regions and has never had any of their schools closed, charter revoked, or had any compliance issues. (p. 26). The proposal also points out that through other financial assessments, IDEA has received a high rating, which suggests that their financial practices are within compliance (p. 26).

#### **Weaknesses:**

No weaknesses 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: 23**

#### 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 proposal states that IDEA schools serves a high percentage of educationally disadvantaged students (students qualifying for free or reduced lunch, English Language Learners and students with disabilities). The proposal includes a comparison of the percentage of disadvantaged students served by IDEA with the percentage in the overall state as well as neighboring school districts. These comparisons demonstrate that IDEA is comparable or serving more disadvantaged students than the comparable districts in most cases. (p. 27).

#### **Weaknesses:**

The proposal on page 27 shows that IDEA is not serving quite as many EL students as comparable districts. This appears to be the case, with significant differences found in the comparison with other school districts in the table.

**Reader's Score: 8**

- 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 proposal states that IDEA will make it a priority to recruit educationally disadvantaged students. Much of this recruiting will be based on the recruiting the school has done in the past, which has been successful. (p. 32). On page 249, the proposal lists a series of strategies the school will employ to recruit students such as bilingual flyers, informational meetings, and using teacher referrals.

**Sub Question**

**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 proposal includes a logic model, which guides the replication and expansion efforts within the proposal. This suggests that the evaluation will be guided by the outputs and outcomes listed in the logic model (Appendix I.22). The evaluation plan is aligned to specific project goals and included objective performance measures to indicate the extent to which the project is address the goals. (p. 37). Moreover, the evaluation plan incorporates qualitative and quantitative data, which suggests that the evaluation will look at performance holistically.

**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: 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 proposal provides a timeline to guide the management plan and execution of the project. This timeline is associated with major launch activities, which can be considered benchmarks and the team responsible for the work is also listed. (p. 44-45 and Appendix I.26). The activities represent those necessary to ultimately realize the goals of the project.

**Weaknesses:**

The proposal does not include activities involving financial oversight in the management plan. In addition, the proposal does not provide adequate detail for the timeline. For example, the timeline only includes launch dates and does not appear to take into account when tasks will be completed (p. 44-45).

**Reader's Score: 3**

## Sub Question

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 proposal lists the leadership team. The leadership team listed possess the necessary skills and knowledge necessary to carry out this work to achieve the overall goals of the project (p. 46-49). Moreover, the leadership team have the necessary breadth of expertise and experience to accomplish all of the intended goals of the project. (p. 46-49; appendix B).

### **Weaknesses:**

No weaknesses 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 proposal conveys that they have a financial and operational model that can be sustained over time. For example, the proposal provides a financial model that projects costs for the term of the grant to indicate the anticipated viability of the project financially (p. 60). In addition, IDEA has been extremely successful at obtaining grant funds from regional and national foundations to carry out this work, which suggests that IDEA is capable of obtaining funds to support this work moving forward. (p. 60)

### **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](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).

### **Strengths:**

The proposal emphasizes how important the location of the schools are important for IDEA to reach a diverse student body (p. 3-6). In particular, the proposal noted the intention to be located in mixed income locations in Austin. In addition, the proposal notes the importance of diverse faculty in order to attract diverse students (p. 6-7).

### **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-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 flexibility<sup>1</sup> 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](http://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:**

Did not address this priority.

**Weaknesses:**

Did not address this priority.

Reader's Score: 0

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## Technical Review Coversheet

Applicant: IDEA Public Schools (U282M170025)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
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<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	22
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	10
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	18
<b>Sub Total</b>	100	95
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	3
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	8	3
<b>Total</b>	108	98

# Technical Review Form

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

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

Applicant: IDEA Public Schools (U282M170025)

## 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: 45

#### 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 data provided in Appendix G indicates increasing academic achievement for all students in the majority of content areas from the 2014-2015 school year to the 2015-2016 school year. (e442-e445) Increased academic achievement is shown in US History and Science for the category at Level II Satisfactory Standard or Above, and for Two or More Subjects, Reading, Writing, Science and Social Studies in the category At Postsecondary Readiness Standard.

Academic achievement as measured by AP exams indicates improved academic achievement for IDEA schools. (e41) The percentage of students earning a score of 3 or higher on at least 3 AP exams has increased each year from 2013 to 2016, including an increase of 10 percentage points from 2015 to 2016.

Graduation rate data demonstrates that IDEA schools graduate students at a higher rate than the state, and have increased graduation rates from 2013 to 2015 (e546)

#### Weaknesses:

No weaknesses identified.

Reader's Score: 15

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:

Graduation rate data demonstrates that IDEA schools graduate students educational disadvantaged (ELL and SPED) students at a higher rate than the state, and have increased graduation rates from 2013 to 2015 (e546).

### Sub Question

Graduation rates for economically disadvantaged students exceeded the state average graduation rate for 2013, 2014, and 2015 (e39).

Attendance rate data was provided to compare educationally disadvantaged students enrolled at IDEA to the state average. For 2013, 2014, and 2015 attendance rates for low-income students, ELL, and special education students was greater than the state average attendance rate. (e39)

Additionally, retention rates for IDEA and the state were provided for 2013 and 2014. The retention rate data for IDEA was greater than the state average by approximately 10 percentage points for 2013 and 2014 (e39).

The data provided in Appendix G indicates increasing academic achievement in the majority of content areas for economically disadvantaged students, ELL students, and special education students. (e45)

#### **Weaknesses:**

No weaknesses identified.

**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 stated that it has not had any schools closed, charters revoked or any statutory compliance issues. Further the applicant indicated that it has met the state of Texas' criteria to be eligible for the Permanent School Fund, which only 10% of charter schools meet. To be eligible for the Permanent School Fund, schools must have three consecutive years of financial audits with unqualified opinions, receive an investment grade credit rating from a national agency, and maintain an academic rating of "Met Standard" from the Texas Education Agency. Meeting these criteria demonstrate that the applicant has not had any financial or academic issues of concern in the past three years. (e46-47)

#### **Weaknesses:**

No weaknesses identified.

**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: 22

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 data provided by the applicant (e47) demonstrates that IDEA enrolls a greater percentage of economically disadvantaged students and ELL students than the surrounding public schools.

**Weaknesses:**

The data provided by the applicant (e47) demonstrates that IDEA enrolls a lower percentage of Special Ed students than the surrounding public schools.

Reader's Score: 7

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 indicates that it provides parents with information regarding its special education program at its annual Welcome Events at each school. (e48)

The applicant provided a community outreach and marketing plan (e249) that describes effective strategies. The plan includes direct interaction with the community through canvassing neighborhoods, and door-to-door distribution of information to parents and students. Materials will be provided in both Spanish and English to eliminate barriers for ELLs. Posting of flyers in high traffic locations such as supermarkets, churches and apartment complexes will get information to large segments of the community.

**Weaknesses:**

No weaknesses identified.

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 logic model (e570) includes outcomes that are related to the grant project's selection criteria, student growth, student achievement, and college matriculation and college success. Quantitative measures of success include student achievement and graduation rates.

The evaluation plan focuses on 3 goals that include quantitative performance measures (e57). First, performance

measures for these goals include student achievement as measured by state exam results, graduation acceptance, and college completion. (e57) Second, performance measures are used to evaluate stability through employee retention, student average daily attendance, student persistence, and annual financial surplus. (e57). The third goal includes performance measures that focus on expansion through the addition of new schools, and increased enrollment by the end of the project period. (e57).

The narrative describes an evaluation that focuses on qualitative research questions (e59) that focus on the integrity of the replication model school (questions 1&3), evaluating the operations of the school, (questions 2&4), relationship of the success of the school to the school culture and community (questions 5&6), and whether the evaluation plan itself supports growth and expansion of the IDEA model (question 7).

**Weaknesses:**

No weaknesses identified.

**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: 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 management plan address key components of a school launch, including governance, administration, facilities, finances, staffing and recruitment. Specific timeframes based on the school launch date have been established and the applicant has identified teams responsible for each component of the plan. (e64-65)

**Weaknesses:**

The management plan does not include information regarding financial management and oversight of project funds. Launch dates are identified but no completion dates or milestones are provided in the management plan to demonstrate a process for monitoring progress of task completion. (e64-65)

**Reader's Score: 3**

## Sub Question

- 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 members of the IDEA team named in the application each have relevant experience in their fields and are not new to the IDEA team, which indicates each has experience in managing growth of the IDEA network and the process for opening new schools. (e66-69, e93-e161)

### **Weaknesses:**

No weaknesses identified.

**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 application indicates that sustainability will be ensured through support from the IDEA central office. Sustainability is addressed through ensuring that from start-up the school has all essential support in place, such as facilities, school leadership through the Principals in Residence program. (e69)

### **Weaknesses:**

No weaknesses identified.

**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](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).**

### **Strengths:**

The applicant provided data that demonstrated that it currently operates schools in the area that have implemented a strategic plan for diversity in the students it enrolls. Specifically that the percentage of African American students has increased over three years from 2.4% to 5.1%. This doubling of the population of African American students has resulted in a more racially diverse student population at the school. (e4-e5)

The applicant also states that the school will be located where segregated socioeconomic groups come together. (e24).

The applicant also has a recruiting plan for teachers and principals to mirror the racial diversity in the population it serves.

IDEA's teaching staff is 79% Hispanic, 15% White, 5% African American, and 1% Asian. The student population at the two IDEA schools in San Antonio are 62% and 73% Hispanic, 20% and 13% African American, and 16% and 14% White. (e26)

**Weaknesses:**

No weaknesses identified.

**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 flexibility<sup>1</sup> 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](http://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**

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