

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

Status: Submitted

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Technical Review Coversheet

Applicant: Montana Office of Public Instruction (S425B200004)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Highest Coronavirus Burden		
1. Coronavirus Burden	20	16
Quality of Project Services and Project Plan		
1. Project Services/Plan	35	27
Quality of Management Plan / Adequacy of Resources		
1. Management Plan/Resources	25	22
Sub Total	80	65
Total	80	65

Technical Review Form

Panel #2 - FY20 REM - 2: 84.425B

Reader #1: *****

Applicant: Montana Office of Public Instruction (S425B200004)

Questions

Selection Criteria - Highest Coronavirus Burden

1. A: Highest Coronavirus Burden (up to 20 Points)

(2) The extent to which the applicant has a high coronavirus burden based on indicators and information factors identified by the applicant in response to Application Requirement 3. (up to 20 points)

Strengths:

The applicant detailed a coronavirus burden stating, nearly every county and tribal government has a partially opened emergency operations center to deal with pandemic. (p. e18) The application also describes tourism, which is a key component of Montana's economic vitality, has been significantly impacted by COVID-19, particularly in Gallatin, Yellowstone, Rosebud, Carbon, Big Horn, Missoula, Toole, Cascade, and Custer counties (p. e18).

Weaknesses:

The application would have been strengthened if surveys or other documentation had been included to support the statement that family and school staff "will not return to schools if they open in person..." (e18).

Reader's Score: 16

Selection Criteria - Quality of Project Services and Project Plan

1. B: Quality of Project Services and Project Plan (up to 35 points)

The Secretary considers the quality of project services and project plan.

In determining the quality of the project services and project plan, the Secretary considers the quality and sufficiency of strategies for ensuring equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. (up to 5 points)

In addition, the Secretary considers--

(1) The extent to which the proposed project is an exceptional approach to absolute priority being addressed and includes a detailed project plan for addressing the absolute priority. (up to 10 points)

(2) The extent to which specific gaps or weaknesses in services, infrastructure, or opportunities have been identified and will be addressed by the proposed project to respond to the needs of students. (up to 10 points)

(3) The likelihood that the services to be provided by the proposed project will expand access to remote learning options and lead to improvements in student outcomes. (up to 5 points)

(4) The extent to which the services to be provided by the proposed project reflect up-to-date knowledge from research and effective practice. (up to 5 points)

Strengths:

The applicant provides sufficient strategies to ensure equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented such as recruitment through community-based organizations that serve target populations. In addition, the "Parent/Student Concierge" role is explicitly charged with directing attention to target underserved groups. (e35).

Sub-criterion 1- The applicant's approach on this project is strengthened by proposing to expand the existing catalog of online courses, for AP and dual credit courses (e24), and for CTE courses (e22). Additional professional development courses, focused on distance and blended learning, will extend the existing offerings delivered through the Teacher Learning Hub. Interest from teachers is evidenced by 3,000 educators participating in online sessions during the 1st 10 weeks of the pandemic.

Sub-criterion 3- Additional course options are expected to expand access to remote learning options, with enrollment projected to grow by 600 students (e23). It is reasonable to expect that the additional professional development efforts (e30-e31) will improve quality of instruction, resulting in improved student outcomes.

Sub-criterion 4- Finally, project team members are active in several online education communities of practice, including QTI, Open Badges, Common Cartridge, and early participation in the CASE project. (p. e39)

Weaknesses:

Although the narrative includes a description of equitable approaches, specific discussion on race or gender was not specified. The proposed professional development goal is to contact a minimum 60% of all "high needs" schools, Tribal schools, and rural schools which reflect the same goal as the overall state average. (p. e33)

Sub-criterion 1- No weaknesses were noted

Sub-criterion 2- The strategy to address identified gap of limited broadband access was unclear (p. e18).

Sub-criterion 3- No weaknesses were noted

Reader's Score: 27

Selection Criteria - Quality of Management Plan / Adequacy of Resources**1. C: Quality of the Management Plan and Adequacy of Resources (up to 25 points)**

In determining the quality of the management plan and adequacy of resources, the Secretary considers--

- (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. (up to 5 points)**
- (2) The extent to which the proposed use of funds will adequately support the proposed project. (up to 5 points)**
- (3) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project. (up to 5 points)**

(4) The extent to which the costs are reasonable in relation to the number of persons to be served and to the anticipated results and benefits. (up to 10 points)

Strengths:

Sub-criterion 1- The applicant provides a comprehensive and detailed plan in the description of quarterly deliverables which also highlights the roles and responsibilities of its participants over the grant lifespan (e72-e80).

Sub-criterion 2- The project cost is reasonable in relation to the funding support for additional personnel to adequately support the proposal (e83; e86-e87).

Sub-criterion 3- The projected costs are reasonable given the objective of adding courses and providing additional professional development for teachers (e83, e86).

Sub-criterion 4- There are implicit long-term benefits, beyond course enrollments over the grant period, by building capacity to deploy and support additional distance learning offerings.

Weaknesses:

Sub-criterion 1- No weaknesses were noted.

Sub-criterion 2- No weaknesses were noted.

Sub-criterion 3- No weaknesses were noted.

Sub-criterion 4- For a total budget of [REDACTED], the project projects 600 additional enrollments in CTE courses (e23), 300 additional enrollments in AP and dual credit courses (e24), and 3000 additional middle school course enrollments (e29)—a cost of nearly [REDACTED] per incremental student course enrollment.

Reader's Score: 22

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Technical Review Coversheet

Applicant: Montana Office of Public Instruction (S425B200004)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Highest Coronavirus Burden		
1. Coronavirus Burden	20	16
Quality of Project Services and Project Plan		
1. Project Services/Plan	35	29
Quality of Management Plan / Adequacy of Resources		
1. Management Plan/Resources	25	21
Sub Total	80	66
Total	80	66

Technical Review Form

Panel #2 - FY20 REM - 2: 84.425B

Reader #2: *****

Applicant: Montana Office of Public Instruction (S425B200004)

Questions

Selection Criteria - Highest Coronavirus Burden

1. A: Highest Coronavirus Burden (up to 20 Points)

(2) The extent to which the applicant has a high coronavirus burden based on indicators and information factors identified by the applicant in response to Application Requirement 3. (up to 20 points)

Strengths:

The applicant clearly describes the geographic context of their state including details about Native American tribes. (p. e18) A description of the potential impact of tourism on their coronavirus burden is explained since visitors from other states may cause an increase in cases this summer. (p.18) A list of counties in the state that contain national parks are also listed.

Weaknesses:

While the applicant briefly describes how increased tourism has been related to an increase in COVID-19 cases, the description lacks specificity as to the direct impact on specific cities or regions in terms of the number of cases, hospitalizations, median age of infected individuals, etc. Thus, it is unclear the extent to which the state's educational system, students and schools have been significantly impacted.

Reader's Score: 16

Selection Criteria - Quality of Project Services and Project Plan

1. B: Quality of Project Services and Project Plan (up to 35 points)

The Secretary considers the quality of project services and project plan.

In determining the quality of the project services and project plan, the Secretary considers the quality and sufficiency of strategies for ensuring equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. (up to 5 points)

In addition, the Secretary considers--

(1) The extent to which the proposed project is an exceptional approach to absolute priority being addressed and includes a detailed project plan for addressing the absolute priority. (up to 10 points)

(2) The extent to which specific gaps or weaknesses in services, infrastructure, or opportunities have been identified and will be addressed by the proposed project to respond to the needs of students. (up to 10 points)

(3) The likelihood that the services to be provided by the proposed project will expand access to remote learning options and lead to improvements in student outcomes. (up to 5 points)

(4) The extent to which the services to be provided by the proposed project reflect up-to-date knowledge from research and effective practice. (up to 5 points)

Strengths:

Strategies to ensure equal access: The applicant plans to align their new course development efforts with the Montana Indian Education for All standards. Reducing the cost share of the IPC model from \$299 to \$100 per enrollment is a strategy that should increase access for students living in poverty. (p. e27) The “Hub” used for teacher professional development plans to expand course offerings for teachers in schools serving underrepresented students, that will include tribal, rural and high-poverty schools (p. e33)

Sub-criterion 1: The applicant’s plan to bring course development ‘in-house’ (p. e25) presents a high-quality, cost-effective sustainable plan for addressing the absolute priority related to the expansion of virtual learning. In addition, the specific courses listed in the expansion plan include those which small or rural school districts are rarely able to offer due to a lack of access to certified teachers with expertise in these CTE or advanced content areas. (p. e22-e24) The existing Montana Digital Academy, described on p. e21-e23, provides a solid foundation on which to build their expansion efforts related to statewide course access.

Sub-criterion 2: The applicant provides a detailed list of current course offerings as well as data to support the gaps in course offerings that could be included with availability of sufficient funding. For example, on page e22-e23, the applicant lists current CTE courses as well as future course electives in CTE areas. The applicant states that only a half-time FTE currently is devoted to course development (p. e25) which presents a significant weakness in their infrastructure when it comes to developing additional course resources, since one half-time employee is not at all sufficient to successfully accomplish the planned expansion.

Sub-criterion 3: The applicant provides a detailed explanation of the number of expected enrollments across expanded course offerings (p. e23) The applicant also provides a list of additional AP and Dual Credit courses they can offer with this funding (p. e24). This plan presents a significant expansion of access to remote learning and the advanced coursework is very likely to lead to improvements in student outcomes.

Sub-criterion 4: The applicant’s plan reflects their intent to align course development with up-to-date standards such as “K-12 Quality Matters” and “Montana Indian Education for All” standards. (p. e25) The use of “Remind” as a communication tool, the 24/7 tutor access (p. e29) and flexibility for teachers to based grades on ‘evidence of mastery’ (p. e29) reflect current knowledge of effective practices related to online learning. MTDA will also apply the National Standards for Quality Online Learning, which should serve to support the development of high-quality courses.

Weaknesses:

Weaknesses:

Weaknesses:

Strategies to ensure equal access: The application lacks details about strategies that will be used to ensure that underrepresented students and families will be able to access these additional courses offered through MTDA. The marketing strategies described on page e33-e34 do not specifically target underrepresented groups of students such as those living in poverty, other than saying staff will “direct attention and resources to target underserved communities” which does not constitute a sufficient, quality strategy.

Sub-criterion 1: No weaknesses were noted.

Sub-criterion 2: While the applicant states “there is substantial interest in additional course programming throughout the state”, the narrative does not provide specificity as to the demand for CTE or advanced (e.g. AP, Dual Credit) courses, so it is unclear whether the lack of these additional courses presents a “weakness” in services.

Sub-criterion 3: The applicant cites weaknesses in broadband access but does not explain how they can improve remote learning and course access without also improving access to internet and hardware necessary to access the new courses.

Sub-criterion 4: The application does not include any indication the applicant has reviewed research or ‘best practices’ from national organizations focused on technology integration or online learning, such as the International Society for Technology in Education (ISTE) or the National Council for Online Education (NCOE). These national organizations could provide a wealth of guidance on best practices and research related to effective delivery models for online learning.

Reader's Score: 29

Selection Criteria - Quality of Management Plan / Adequacy of Resources

1. C: Quality of the Management Plan and Adequacy of Resources (up to 25 points)

In determining the quality of the management plan and adequacy of resources, the Secretary considers--

- (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. (up to 5 points)**
- (2) The extent to which the proposed use of funds will adequately support the proposed project. (up to 5 points)**
- (3) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project. (up to 5 points)**
- (4) The extent to which the costs are reasonable in relation to the number of persons to be served and to the anticipated results and benefits. (up to 10 points)**

Strengths:

Sub-criterion 1: The applicant provides an extremely detailed timeline on pages e74-e79 with specific tasks for each quarter of each year during the grant period. The applicant adequately describes the responsibilities of the newly hired Instructional Content Specialists and OER Development specialists. Specific milestones are listed on page e26 and e27, clearly describing the progression of project activities needed to accomplish project objectives. In addition, resumes are provided (p. e44-e55) for five individuals and current positions clearly indicate which individuals will be responsible for overseeing particular project components (e.g. Bartow for course development, Bryant for teacher professional learning, Currie/Neiffer for MTDA oversight, etc).

Sub-criterion 2: Most of the budget will be used for staffing new positions (3 at Montana state education agency and 9 at Montana Digital Academy) which will adequately support the development and expansion efforts proposed in this project. Having an instructional content specialist specific to each of five content areas is a good strategy for ensuring the depth of content knowledge necessary to accomplish this task. The allocation of travel funds to attend state and national conferences on distance learning will also serve to support expansion efforts, keeping staff up-to-date on current research and trends in the field of online learning.

Sub-criterion 3: Funds for staffing are directly aligned with the proposed plans and are allocated proportionally. For example, course development is the largest task in the proposed project, and five positions are allocated within MTDA to accomplishing this. (p. e86) The salaries for Montana state education agency staff are very reasonable (p. e83)

Sub-criterion 4: The support for the Hub has the potential to reach a significant number of educators. For example, the applicant states within ten weeks of remote learning this past spring, they already had 3,000 educators participate. The initial priority topics (p. e31) are all highly valuable to educators and as such, there may be educators that are 'repeat users'; in that, they will benefit from enrolling in multiple professional learning opportunities. The MT Learn Task Force is an excellent strategy to ensure topics are consistent with the teachers' professional learning needs regarding implementation of high-quality remote learning. (p. e32) Serving 3,000 additional middle school students and almost 1000 new high school course enrollments indicates a reasonable return on investment given the potential long-term benefits of the increased course access. The total budget of just over [REDACTED] represents less than half the allowable funding request indicating the applicant's commitment to developing and implementing cost-effective long-term solutions to their states digital course access needs.

Weaknesses:

Sub-criterion 1: Page e26 states that by year 2, they will have a total of 5 yearlong courses and by year 3, have a total of 10 yearlong courses in each core content area. Yet, the timeline on page e78 states in Year 3 Quarter 3, specialists will "continue development of a second year long course" and Year 3, Quarter 2 states "continue development of a third year long course", which is inconsistent with previous specification in the narrative about milestones for course development.

Sub-criterion 2: No weaknesses were noted.

Sub-criterion 3: The application does not clearly explain whether all of the new courses will be developed in-house, or whether they will be contracting with a third-party vendor for the middle school courses as well as AP and CTE. Specifically, page e74 and e76 state they will "review/sign vendor agreement for middle school content" for new course offerings. It is unclear why they would need to fund so many course development positions if they were contracting with third party vendors.

Sub-criterion 4: No weaknesses were noted.

Reader's Score: 21

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Technical Review Coversheet

Applicant: Montana Office of Public Instruction (S425B200004)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Highest Coronavirus Burden		
1. Coronavirus Burden	20	16
Quality of Project Services and Project Plan		
1. Project Services/Plan	35	30
Quality of Management Plan / Adequacy of Resources		
1. Management Plan/Resources	25	20
Sub Total	80	66
Total	80	66

Technical Review Form

Panel #2 - FY20 REM - 2: 84.425B

Reader #3: *****

Applicant: Montana Office of Public Instruction (S425B200004)

Questions

Selection Criteria - Highest Coronavirus Burden

1. A: Highest Coronavirus Burden (up to 20 Points)

(2) The extent to which the applicant has a high coronavirus burden based on indicators and information factors identified by the applicant in response to Application Requirement 3. (up to 20 points)

Strengths:

Sub-criterion 2: The data provided on page e18- 19 in the application gives evidence to Montana's Covid 19 burden. "Of 147,713 K-12 students in public and non-public accredited schools (Montana Office of Public Instruction), an estimated 22,654 students are not connected to broadband of which 8,485 are rural students" (page e18). State leaders believe that ensuring these students have internet connectivity is a priority so that if students have school interruption due to Covid 19, these students will have equal access to learning.

Weaknesses:

Sub-criterion 2: Montana describes "an estimated 22,654 students are not connected to broadband of which 8,485 are rural students" (page e18); however, the Department does not provide evidence how this funding will help students without broadband access the Digital Academy. The applicant presents information explaining that the state legislature is exploring this issue but no cited evidence of commitment to help the 8,485 students.

Reader's Score: 16

Selection Criteria - Quality of Project Services and Project Plan

1. B: Quality of Project Services and Project Plan (up to 35 points)

The Secretary considers the quality of project services and project plan.

In determining the quality of the project services and project plan, the Secretary considers the quality and sufficiency of strategies for ensuring equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. (up to 5 points)

In addition, the Secretary considers--

(1) The extent to which the proposed project is an exceptional approach to absolute priority being addressed and includes a detailed project plan for addressing the absolute priority. (up to 10 points)

(2) The extent to which specific gaps or weaknesses in services, infrastructure, or opportunities have been identified and will be addressed by the proposed project to respond to the needs of students. (up to 10 points)

(3) The likelihood that the services to be provided by the proposed project will expand access

to remote learning options and lead to improvements in student outcomes. (up to 5 points)

(4) The extent to which the services to be provided by the proposed project reflect up-to-date knowledge from research and effective practice. (up to 5 points)

Strengths:

On page e33, Montana lists as an objective that 60% of tribal schools will have access to online competency-based courses.

Sub-criterion 1: The proposed project addresses Absolute Priority 2 and provides a detailed plan on pages e19 through e25. Through the expansion of course offerings using the Digital Academy, the applicant provides evidence of the ability to enroll an additional 1,800 students over the course of the three years. The applicant explains students requested courses and provided evidence of the requests.

Sub-criterion 2: Montana details many students require courses to fulfill graduation requirements. Additionally, this list of course offerings will attract more students to CTE programs and provide more career and college pathways through dual credits courses, AP classes, and offerings such as Google Business Tools and Cybersecurity.

Sub-criterion 3: The expansion of the IPC will offer courses to grades 6 through 8, which will add an additional 3000 online course enrollment (page e29). The Teacher Learning Hub provides a vehicle to improve teacher effectiveness and online teaching. The Teacher Learning Hub expansion demonstrates it will improve the quality of online instruction (pages e32-33).

Sub criterion 4: Montana states that they are a "founding member of the VLLA, an organization of state virtual schools that focus on quality program offerings for students." Also, members of MTDA's program team, along with Quality Matters, participated in the effort to update online course standards from the International Association for K-12 Online Learning. The updated standards were released as The National Standards for Quality Online Learning, with specific standards for Online Courses, Online Teaching, and Online Programs (page e38).

Weaknesses:

The applicant does not address "equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability." Montana states, "MTDA recently rolled out Individualized Pathway Courses (IPCs), aimed at students that are not candidates for traditional distance learning environments" (page e19). The remainder of the section does not describe these students and why IPCs are advantageous for them.

Sub-criterion 1: No weaknesses noted

Sub-criterion 2: Montana lists over 20 courses (AP and dual credit) to add; however, no indication of selected course demand. Development of courses not in student demand is contradictory to effective funding implementation.

Sub-criterion 3: Lack of information on how students lacking computer hardware and broadband will have access to indicated online classes.

Sub criterion 4: No weaknesses noted

Reader's Score: 30

Selection Criteria - Quality of Management Plan / Adequacy of Resources

1. C: Quality of the Management Plan and Adequacy of Resources (up to 25 points)

In determining the quality of the management plan and adequacy of resources, the Secretary considers--

- (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. (up to 5 points)**
- (2) The extent to which the proposed use of funds will adequately support the proposed project. (up to 5 points)**
- (3) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project. (up to 5 points)**
- (4) The extent to which the costs are reasonable in relation to the number of persons to be served and to the anticipated results and benefits. (up to 10 points)**

Strengths:

Sub-criterion 1: The Project Plan details an effective marketing plan to advertise the new courses to students and parents (i.e. social media). The Project Plan also includes establishing a Parent/Student Concierge to contact middle school students and students that are considered challenging to reach (pages e34-35). As a member of the Virtual Learning Leadership Alliance, Montana, the applicant will gain access to valuable resources and support to create online courses. This membership will allow an effective plan to be applicant implemented (page e38). Montana demonstrates online courses will fulfill content standards using CASE specifications and Quality Matters (page e39).

Sub-criterion 2: The budget narrative (pages e82-89) is detailed and is reasonable. Pages e72-79 provides a timeline for activities and details cost per course and the number of students in each class.

Sub-criterion 3: The professional development online Hub demonstrates it would be an effective resource to teachers, provide instructional support for teaching online and support teachers working with students remotely.

Sub criterion 4: The extent to which costs are reasonable in relation to the number of students served is described in detail in the budget narrative and the timetable is restated (pages e82-89).

Weaknesses:

Sub-criterion 1: No weakness noted

Sub-criterion 2: Students without broadband are noted on page e18, however, there is no evidence related to internet connectivity costs or cost to purchase computer hardware for students. Page e18 explains the state legislature was examining this issue but no further details how the state addressed this issue or, if COVID-19 impacted the state budget to address the issue. If target students lack internet access, the applicant did not demonstrate how students would benefit from the specified service.

Sub-criterion 3: No weakness noted

Sub criterion 4: No weakness noted

Reader's Score: 20

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