

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

Status: Submitted

Last Updated: 08/24/2022 04:17 PM

## Technical Review Coversheet

Applicant: Helix Community Schools (S282B220004)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Management Plan</b>		
1. Management Plan	40	34
<b>Sub Total</b>	40	34
<b>Continuation</b>		
<b>Quality of the Continuation Plan</b>		
1. Continuation Plan	20	15
<b>Sub Total</b>	20	15
<b>Selection Criteria</b>		
<b>Quality of Project Design</b>		
1. Quality of Project Design	10	7
<b>Need for Project</b>		
1. Need for Project	30	24
<b>Sub Total</b>	40	31
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Competitive Preference Priority 1</b>		
1. CPP1	5	3
<b>Sub Total</b>	5	3
<b>Total</b>	105	83

# Technical Review Form

Panel #2 - Developers New Panel - 2: 84.282B

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

Applicant: Helix Community Schools (S282B220004)

## Questions

### Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the following factors:

Reader's Score: 34

#### Sub

1. (i) 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 10 points). (34 CFR 75.210(g)(2)(i))

#### Strengths:

The strength of this application is Helix Community Schools has opened three topic-specific schools in the last 12 years and is looking to open two more beginning the fall of 2024. Page e31 and e55. The leadership understands the challenges facing the opening of high-quality seats, whether it be recruiting students or certified teachers, and they have made contingencies to face these challenges. Page e30. There are clearly defined roles and responsibilities of Governance Board Members along with a chart of a three-prong leadership team. Pages e57-e59 and Page e55. The board members' professions and skill sets are varied, which lend to a diverse group for problem solving and innovation. There is also information regarding the roles and responsibilities of those engaged with the financial piece of the school. Page e66. It is evident in the grant there will be milestones to measure progress and success. Pages e60-e63.

Additionally, the scope of this grant will be implemented in two Phases: Pages I, Planning, and Phase II, the Implementation. Page e148

There is evidence of timelines and measurable milestones to monitor success. Pages e153-e154.

#### Weaknesses:

Although there is a project timeline submitted, the information on it ends in December 2024. Therefore, it is unclear what will occur after this date.

Reader's Score: 8

2. (ii) 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). (34 CFR 75.210(f)(2)(iv))

#### Strengths:

Helix Community Schools has proven in their five-year budget that they have been thorough in allowing for almost every expense that could arise. Pages e24 and e25. The strength of their budget of estimated revenue vs. expenses provides a foundation for planning and expenditures. Page e23.

**Weaknesses:**

The budget is based on receiving state aid with an aggressive first-year enrollment of 1,350 students in grades K-8. e23. Since there is no documentation that they will meet these enrollment numbers, their budget could be weak. There is evidence found in the Budget Narrative of an overly large amount of the budget going towards administrators' salaries.

**Reader's Score: 4**

- 3. (iii) The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project (up to 5 points). (34 CFR 75.210(g)(2)(iv))**

**Strengths:**

The roles and responsibilities of the key administrators to oversee this expansion has been outlined in a table. Pages e149-e152. This information shows the intentionality of those involved in the planning of this project. The Helix grant outlines the amount of time key leaders will spend on implementing this project. Page e155. This strength gives the leaders guidance when strategizing and organizing their work life. This guidance should keep the planned opening date as a realistic goal.

**Weaknesses:**

There are no weaknesses evident.

**Reader's Score: 5**

- 4. (iv) The qualifications, including relevant training and experience, of key project personnel (up to 5 points). (34 CFR 75.210(e)(3)(ii))**

**Strengths:**

There will be a three-person leadership team which will include a President, Vice-President, and Chief Schools Officer. Pages e68-e70. The individuals who are in these roles currently have resumes and experience that are extensive. Another advantage and, therefore a strength is that they have worked in Helix Community Schools, and they know its culture, mission, and vision.

**Weaknesses:**

The weakness lies in the voluminous information regarding the role of Governance Board members, including their resumes and their preparedness to assess operations, finances, and academic progress regularly. Pages e56-e59. It is as if these board members will be running the day-to-day operation rather than as an oversight governing body.

**Reader's Score: 3**

- 5. (v) The adequacy of the applicant's plan to maintain control over all CSP grant funds (up to 5 points). (2022 NFP)**

**Strengths:**

Providing Helix is awarded this grant, their administrators will contract with a non-profit charter school management company for oversight. They have explained the financial manager will work with operations and the board to set up an infrastructure to ensure grant funds are expended well within compliance. Between the management

**Sub**

company's expertise and the financial manager's expertise, there is no doubt Helix A& M will have more than adequate control of the CSP grant funds if awarded. Page e151

**Weaknesses:**

No weaknesses are evident.

**Reader's Score: 5**

**6. (vi) The adequacy of the applicant's plan to make all programmatic decisions (up to 5 points). (2022 NFP)**

**Strengths:**

This grant provides an outline for the decision-making process. There is an Executive Team, Instructional Team, and Operational/Financial Team. These teams meet regularly to create a consistent programmatic decision-making process. Pages e162, e163. When the chain of command is clearly defined, there is a greater chance for success.

**Weaknesses:**

There are no weaknesses evident.

**Reader's Score: 5**

**7. (vii) The adequacy of the applicant's plan to administer or supervise the administration of the grant, including maintaining management and oversight responsibilities over the grant (up to 5 points). (2022 NFP)**

**Strengths:**

According to the Helix grant application, this proposal is more than adequate to administer these grant funds with fidelity. The applicant has made provisions for a strong, well-trained Governance Board to oversee benchmarks along with outlining the roles and responsibilities of a project leadership team that anticipates the launching of two schools in consecutive years. Pages e64, e66, e155, e159, and e160 This model has had experience with opening multiple new schools in the past ten years and has historical knowledge of the challenges they face. Pages e28-e30

**Weaknesses:**

A weakness is giving the Governance Board too much engagement in the day-to-day operations. Board members are not trained educators; they are lawyers and business leaders Pages 159-160

**Reader's Score: 4**

**Continuation - Quality of the Continuation Plan**

**1. In determining the quality of the continuation plan, the Secretary considers the extent to which the eligible applicant is prepared to continue to operate the charter school that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under this program are no longer available. (2019 NFP)**

**Strengths:**

There is evidence that Helix has planned to sustain its operations after grant funding is expended through Louisiana state per-pupil allocations and federal title funds. These funds will account for 89 percent of the budget's funding stream, with the private contributions and grants filling the financial gap. Pages e166 and e167

**Weaknesses:**

This budget is based on an aggressive enrollment of 1,350 students in K-8 grades in one school and the same number of students the following year in the second newly launched school. There is no evidence this is a realistic enrollment number, such as parental demand or lottery. Page e166

**Reader's Score:** 15

**Selection Criteria - Quality of 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 following factors:**

**Reader's Score:** 7

**Sub**

- 1. (i) The extent to which the proposed project demonstrates a rationale (as defined in 34 CFR 77.1(c)) (up to 5 points). (34 CFR 75.210(c)(2)(xxix))**

**Strengths:**

Helix A & M addresses the rationale of this proposal in a strong manner annotating three focal areas: 1) students will graduate with skill sets preparing them for the next phase of life, either college or trade; 2) students will be immersed in a strong culture which respects the values of the economically disadvantaged and 3) students will have a sustainable school environment due to prudent fiscal management. Pages e167, e168

**Weaknesses:**

There is no research or data which proves that these specific focus areas will impact the academic growth of the students.

**Reader's Score:** 4

- 2. (ii) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable (up to 5 points). (34 CFR 75.210(c)(2)(i))**

**Strengths:**

A project Logic Model is provided, which lays the foundation for a successful launch of two schools. This table uses specific, measurable, achievable, realistic, and timely goals with quarterly assessments in the areas of academic progress, academic growth, and financial stability. Pages e184-e188. The goals provide a "map" for stakeholders to follow and ensure the project's focus is achieved.

**Weaknesses:**

Although the end goal is to achieve a "B" grade within the next three years, Helix Community Schools has over ten years of historical data, and they currently stand with a "C" grade. To achieve this "B" grade, there is no evidence on what different approaches will be implemented. Page e188 and e32

**Reader's Score:** 3

## Selection Criteria - Need for Project

1. **The Secretary considers the need for the proposed project. In determining the need for the proposed project, the Secretary considers one or more of the following factors:**

**Reader's Score:** 24

### Sub

1. **(i) The magnitude or severity of the problem to be addressed by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(i))**

#### **Strengths:**

Helix Community Schools recognizes the severity of the need to launch two profession-focused schools within the next three years, which is essential in these two areas of society. The targeted areas are technology and healthcare. The grant supports this vision through workforce statistics showing there will be more demand for these professions. Page e168. To strengthen the idea of preparing economically disadvantaged students in the fields of technology and healthcare, they intend to meet these needs by opening first an immersive culture focusing on Artificial Intelligence and then the following year, a Medical Academy. Page e122 They do present the need for a career-based curriculum.

#### **Weaknesses:**

This grant proves there is a regional/global economic need for the school's professional focus areas, but there is no data that supports the idea of a need for these students in this demographical area to focus on agriculture. Or another example, no data supports how a kindergarten student can benefit from a curriculum based on healthcare. There is a lack of attention given to data that would support the need for these career-focused schools

**Reader's Score:** 13

2. **(ii) The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(ii))**

#### **Strengths:**

The vision of launching both technology and healthcare-focused schools is supported by the fact these schools will be introducing these ideas and concepts beginning in Kindergarten and then moving through the 12th grade. Through curriculum and mission alignment K-12, students in these expanded schools will have a better chance of entering professions in those fields. Page e122 This immersive project-center approach in grades K-12 allows students to have the space and exposure to learn concepts that will build from year-to-year without gaps.

#### **Weaknesses:**

Their main argument was that the district was in turmoil and this school would be a better alternative for area students, but there are no specifics on exactly why they would be a better alternative. There is no documentation to support parent demand which would support their aggressive enrollment numbers.

**Reader's Score:** 11

## Priority Questions

### Competitive Preference Priority 1 - Competitive Preference Priority 1

1. **Competitive Preference Priority 1—Promoting High-Quality Educator and Community-Centered Charter Schools to Support Underserved Students. (Up to 5 points).**

1. Under this priority, an applicant must propose to open a new charter school, or to replicate or expand a high-quality charter school, that is developed and implemented—With meaningful and ongoing engagement with current or former teachers and other educators (0 or 1 point); and

2. Using a community-centered approach that includes an assessment of community assets, informs the development of the charter school, and includes the implementation of protocols and practices designed to ensure that the charter school will use and interact with community assets on an ongoing basis to create and maintain strong community ties. (Up to 2 points).

In its application, an applicant must provide a high-quality plan that demonstrates how its proposed project would meet the requirements in paragraph (a) of this priority, accompanied by a timeline for key milestones that span the course of planning, development, and implementation of the charter school. (Up to 2 points).

**Strengths:**

1. There is documentation that Helix Community Schools will open two new schools. The first will be Artificial Intelligence in 2024-2025 year. This would be a K-8 school the first year, and the second year would expand to 9th grade and add a grade every year thereafter. The second school would be a Medical Academy focusing on healthcare and would open in 2025-2026. This fulfills the requirement of this expansion grant. Pages e144

2. Helix Community Schools grant states that they believe in the Community-Centered Approach, which engages all community stakeholders to assess the needs of the region and to implement best practices designed to meet the students' needs and ensure their success. Page e146

It is stated that they will use both formal and informal methods to engage the community in the evaluation of the school's culture and the academic and financial areas.

3. Helix Community Schools has a well-documented plan to open two K-8 charter schools beginning in the 2024 school year. They are planning to collaborate with the St. Landry Parish School Board to bring better educational opportunities to the community. Additionally, they will seek current educators' opinions on best practices and solutions to possible challenges that may arise in these openings. Pages e146-e148

**Weaknesses:**

1. There are no weaknesses.

2. The only weakness found is that there is no mention as to what specific method(s) will be used to formally or informally engage their community nor how often for those assessments.

3. The Project-at-a-Glance Timeline is flawed because it only goes through December of 2024, and there will still be another school to launch in the 2025 school year. Pages e154

**Reader's Score:** 3

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**Status:** Submitted  
**Last Updated:** 08/24/2022 04:17 PM



Status: Submitted

Last Updated: 08/19/2022 04:47 PM

## Technical Review Coversheet

Applicant: Helix Community Schools (S282B220004)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Management Plan</b>		
1. Management Plan	40	36
<b>Sub Total</b>	40	36
<b>Continuation</b>		
<b>Quality of the Continuation Plan</b>		
1. Continuation Plan	20	18
<b>Sub Total</b>	20	18
<b>Selection Criteria</b>		
<b>Quality of Project Design</b>		
1. Quality of Project Design	10	7
<b>Need for Project</b>		
1. Need for Project	30	24
<b>Sub Total</b>	40	31
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Competitive Preference Priority 1</b>		
1. CPP1	5	3
<b>Sub Total</b>	5	3
<b>Total</b>	105	88

# Technical Review Form

Panel #2 - Developers New Panel - 2: 84.282B

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

Applicant: Helix Community Schools (S282B220004)

## Questions

### Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the following factors:

Reader's Score: 36

#### Sub

1. (i) 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 10 points). (34 CFR 75.210(g)(2)(i))

#### Strengths:

The timeline is sufficient for the project. (e152-e154) Responsibilities are clearly defined and related to each leader's area of expertise. (e148-e151 & e159-160) The budget includes items that will support the school's early years, with a focus on personnel costs and initial equipment purchases.

#### Weaknesses:

The applicant states that they will develop specific milestones for the project during the planning year, therefore none are provided. (e148) The timeline ends in December 2024 but the grant funding and related activities continue through five years. The narrative is vague on sources for other revenue. (e166) These omissions indicate that planning may be inadequate.

Reader's Score: 6

2. (ii) 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). (34 CFR 75.210(f)(2)(iv))

#### Strengths:

Costs for proposed expenses are reasonable and are aligned with program goals.

#### Weaknesses:

No weaknesses noted

Reader's Score: 5

3. (iii) The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project (up to 5 points). (34 CFR 75.210(g)(2)(iv))

**Sub**

**Strengths:**

Time commitments for the executive leaders are clearly defined. The school leader will be hired in January 2023 and will be committed 100% to the project. Commitments and responsibilities appear appropriate to the task. (e119-121)

**Weaknesses:**

No weaknesses noted

**Reader's Score: 5**

**4. (iv) The qualifications, including relevant training and experience, of key project personnel (up to 5 points). (34 CFR 75.210€(3)(ii))**

**Strengths:**

All key personnel have professional experience and educational backgrounds that are appropriate and adequate. Adding in the professional experience and associations of the board members provides the school with a strong foundation. (e155-e158)

**Weaknesses:**

No weaknesses noted

**Reader's Score: 5**

**5. (v) The adequacy of the applicant's plan to maintain control over all CSP grant funds (up to 5 points). (2022 NFP)**

**Strengths:**

The applicant has identified the financial manager who is responsible for fiscal policies and grant expenditures, and who will work with school operations staff and the governing board to establish policies and procedures for the school. The school will establish a finance committee to oversee school finances. The proposal provides a commitment to follow all generally accepting accounting principles for financial management and grant funding accountability. (e150-151, e160-161)

**Weaknesses:**

No weaknesses noted

**Reader's Score: 5**

**6. (vi) The adequacy of the applicant's plan to make all programmatic decisions (up to 5 points). (2022 NFP)**

**Strengths:**

The organization has clearly designated roles in operations and administration to support making programmatic decisions. The CSO oversees the academic and instructional decisions and the school leader reports to the CSO. The executive team, including the president, the vice president, and the chief schools officer, are employees of the charter management organization, Helix Community Schools. They are responsible for programmatic decisions, under the direction of the governing board. (e160-162)

**Sub**

**Weaknesses:**

No weaknesses noted

**Reader's Score: 5**

**7. (vii) The adequacy of the applicant's plan to administer or supervise the administration of the grant, including maintaining management and oversight responsibilities over the grant (up to 5 points). (2022 NFP)**

**Strengths:**

The grant will be administered by the executive leadership team and monitored by the governing board. The President reports to the governing board and holds ultimate responsibility for grant oversight. (e161)

**Weaknesses:**

No weaknesses noted

**Reader's Score: 5**

**Continuation - Quality of the Continuation Plan**

**1. In determining the quality of the continuation plan, the Secretary considers the extent to which the eligible applicant is prepared to continue to operate the charter school that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under this program are no longer available. (2019 NFP)**

**Strengths:**

The continuation plan takes into account future enrollment projections which determine state revenue, as well as local taxes and other earnings. The table of projections provides expected revenue from all sources over the first 5 years of operations and documenting the expected surplus. The proposal indicates that the school is prepared to operate on 89% of its projected funding if needed, as this is the amount expected from state sources. The balance will come from federal programs, grants, and donations. This conservative approach to finances demonstrates that the applicant has prepared for continuation of the program from a financial standpoint. (e165-167)

**Weaknesses:**

The proposal does not provide evidence of community support for this program through surveys, parent interest, or letters of interest. Without evidence of support for strong initial enrollment, the continuation plan for funding after the grand term ends is not secure. (e165-167)

**Reader's Score: 18**

**Selection Criteria - Quality of 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 following factors:**

**Reader's Score: 7**

**Sub**

- 1. (i) The extent to which the proposed project demonstrates a rationale (as defined in 34 CFR 77.1(c)) (up to 5 points). (34 CFR 75.210(c)(2)(xxix))**

**Strengths:**

The proposal describes the curriculum and instructional approach. (e177-183) The applicant provides a copy of the school's charter application which includes data from another Helix school that has shown promising results, but does not address this data in the grant narrative. (e31-e36)

**Weaknesses:**

The applicant does not provide data to show that this program or similar programs have achieved the desired goals. The proposal does not provide supporting research or evaluation findings to suggest the project is likely to improve academic achievement for the intended target student population. (e167-168)

**Reader's Score: 4**

- 2. (ii) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable (up to 5 points). (34 CFR 75.210(c)(2)(i))**

**Strengths:**

The applicant's primary goal is to obtain a B letter grade on the school performance framework within the first three years. The applicant provides a chart of metrics to demonstrate how they will measure progress toward goals. (e185-188)

**Weaknesses:**

The proposal does not clearly state the goals, objectives, and expected outcomes for the project. For example, the chart lists "Student progress on interim assessments" and states that the board will track progress, but there is no specific output (# of students to be tested), or outcome (expected improvement). The narrative says that each objective is overseen by a specific board member, but those names appear to be missing. The connection between goals, objectives, outcomes, and measures is not clearly defined. (e185-188)

**Reader's Score: 3**

**Selection Criteria - Need for Project**

- 1. The Secretary considers the need for the proposed project. In determining the need for the proposed project, the Secretary considers one or more of the following factors:**

**Reader's Score: 24**

**Sub**

- 1. (i) The magnitude or severity of the problem to be addressed by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(i))**

**Strengths:**

The applicant provides some data to support the need for workforce development in healthcare and other STEM-related careers. The proposal discusses the need for providing career-focused education in AI and Healthcare to underrepresented youth, indicating the potential future growth for jobs in these fields. (e168-e169)

**Sub**

**Weaknesses:**

The proposal does not provide data to support their statement of need. For example, they do not discuss unemployment rates, graduation rates, or income levels in this community or at a national level. The proposal does not discuss academic achievement and challenges specific to any sub-groups to demonstrate the magnitude of the problem. Without this information, they do not make a strong case for the problem. (e168-e169)

**Reader's Score: 12**

**2. (ii) The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(ii))**

**Strengths:**

The program expects to serve 80% economically disadvantaged students. The proposal describes challenges faced by the local school district. The applicant states the intention of prioritizing the needs of the target population in social-emotional learning, counseling, and academic support. (e170)

**Weaknesses:**

There is minimal discussion of local demographics and how this information might add to the need for this program or present additional challenges. For example, the proposal states that 83.2% of students in the district are economically disadvantaged and that 13.5% are students with disabilities but there is no correlating data to indicate the academic progress of these students. (e169-170)

No evidence is provided to show higher graduation rates or access to STEM jobs for students who complete programs similar to this one. No data is provided within the grant narrative to show academic improvements for students attending other Helix schools, although this is referenced in the charter application that was provided. (e169-170)

**Reader's Score: 12**

**Priority Questions**

**Competitive Preference Priority 1 - Competitive Preference Priority 1**

**1. Competitive Preference Priority 1—Promoting High-Quality Educator and Community-Centered Charter Schools to Support Underserved Students. (Up to 5 points).**

**1. Under this priority, an applicant must propose to open a new charter school, or to replicate or expand a high-quality charter school, that is developed and implemented—With meaningful and ongoing engagement with current or former teachers and other educators (0 or 1 point); and**

**2. Using a community-centered approach that includes an assessment of community assets, informs the development of the charter school, and includes the implementation of protocols and practices designed to ensure that the charter school will use and interact with community assets on an ongoing basis to create and maintain strong community ties. (Up to 2 points).**

**In its application, an applicant must provide a high-quality plan that demonstrates how its proposed project would meet the requirements in paragraph (a) of this priority, accompanied by a timeline for key milestones that span the course of planning, development, and implementation of the charter school. (Up to 2 points).**

**Strengths:**

The applicant plans to administer quarterly surveys and to host community townhalls to seek input from stakeholders. The applicant expresses the intention to develop community assets. The proposal lists a number of possible community partners who have established relationships with school leaders and the organization. The school plans to identify department chairs who will be teacher leaders and who will provide input into curricular decisions and teacher development once the school is operational.

**Weaknesses:**

The applicant does not fully address this competitive preference priority. The school is being developed by leadership with education background but little evidence is provided for seeking input from others before teachers are hired. The proposal mentions a commitment to utilizing community assets but this activity is not shown on the timeline or table of responsibilities. The parent and community engagement plan is not scheduled for development until November 2023, well after the school leader has been hired and many curricular decisions have been made.

**Reader's Score:**     **3**

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**Status:**             Submitted  
**Last Updated:**    08/19/2022 04:47 PM

Status: Submitted

Last Updated: 08/24/2022 01:43 PM

## Technical Review Coversheet

Applicant: Helix Community Schools (S282B220004)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Management Plan</b>		
1. Management Plan	40	39
<b>Sub Total</b>	40	39
<b>Continuation</b>		
<b>Quality of the Continuation Plan</b>		
1. Continuation Plan	20	15
<b>Sub Total</b>	20	15
<b>Selection Criteria</b>		
<b>Quality of Project Design</b>		
1. Quality of Project Design	10	4
<b>Need for Project</b>		
1. Need for Project	30	24
<b>Sub Total</b>	40	28
<b>Priority Questions</b>		
<b>Competitive Preference Priority 1</b>		
<b>Competitive Preference Priority 1</b>		
1. CPP1	5	3
<b>Sub Total</b>	5	3
<b>Total</b>	105	85



# Technical Review Form

Panel #2 - Developers New Panel - 2: 84.282B

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

Applicant: Helix Community Schools (S282B220004)

## Questions

### Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers the following factors:

Reader's Score: 39

#### Sub

1. (i) 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 10 points). (34 CFR 75.210(g)(2)(i))

#### Strengths:

The management plan is very clearly articulated and includes all required elements. On pages 6-8 a chart is presented of the specific individuals involved in the project, as well as their roles and responsibilities. On pages 10-11 a timeline is presented which includes a phased project plan that is divided by focus area, task and expected deadline.

#### Weaknesses:

No weaknesses were noted.

Reader's Score: 10

2. (ii) 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). (34 CFR 75.210(f)(2)(iv))

#### Strengths:

The budget narrative generally suggests that the costs are reasonable in relation to the objectives of the grant: Technology, classroom supplies and furniture.

#### Weaknesses:

The applicant requests full coverage of the principal's salary for 5 years as well as that of other key personnel. A reliance on grant funding for core positions may demonstrate a lack of sustainability.

Reader's Score: 4

3. (iii) The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project (up to 5 points). (34 CFR 75.210(g)(2)(iv))

**Sub**

**Strengths:**

The roles and responsibilities within the management plan are clearly articulated and aligned to the strategies put forward in the proposal (see chart included on pages 6 & 7).

“The time commitments of the Project Director and other key project personnel are appropriate and adequate to meet school launch objectives and milestones. Preston Castille, Jr., President, will serve as the Project Director and will dedicate 50% of his time for planning purposes, which is adequate for managing this project in coordination with other C-Suite personnel. Similarly, the Chief Schools Officer and Executive Vice President will dedicate 50% of their time to the planning and implementation of the project. These key project personnel have successfully executed similar projects, such as the launch and Year 1 management of two high-quality charter schools in Baton Rouge, Louisiana. The Financial Manager will dedicate 45% of his time to the financial management of this Project. Upon hire, the school leader will be 100% dedicated to the successful planning and implementation of this project“(p.12).

**Weaknesses:**

There were no weaknesses noted.

**Reader's Score: 5**

**4. (iv) The qualifications, including relevant training and experience, of key project personnel (up to 5 points). (34 CFR 75.210€(3)(ii))**

**Strengths:**

The individuals selected to lead the grant/school effort are highly qualified for their roles and have existing ties to the community which they intend to serve (p. 6-8; 16-17).

**Weaknesses:**

There are no weaknesses found.

**Reader's Score: 5**

**5. (v) The adequacy of the applicant’s plan to maintain control over all CSP grant funds (up to 5 points). (2022 NFP)**

**Strengths:**

The school is overseen by an established Board of Directors (P. 16 & 17). The board has an existing and functioning finance committee (p.17). The school employs a financial manager who will have day to day responsibility over the grant finances (p.17). Commitments were made by the applicant to meet all Louisiana requirements for fiscal best practice (p.18).The school makes a commitment to have an external auditor review the grant funds (pg. 18).

**Weaknesses:**

There are no weaknesses noted.

**Reader's Score: 5**

**6. (vi) The adequacy of the applicant’s plan to make all programmatic decisions (up to 5 points). (2022 NFP)**

**Sub**

**Strengths:**

The school has an established leadership structure which supports their ability to execute on important decisions. The school is overseen by an established Board of Directors (P. 16 & 17). The school describes a team structure that is used for decision making (p.19).

**Weaknesses:**

There were no weaknesses noted.

**Reader's Score: 5**

**7. (vii) The adequacy of the applicant's plan to administer or supervise the administration of the grant, including maintaining management and oversight responsibilities over the grant (up to 5 points). (2022 NFP)**

**Strengths:**

The school demonstrates a strong plan for the management of its program (p.10-11). The school also presents a continuous improvement approach for decision making which is thorough (p.19).

**Weaknesses:**

There were no weaknesses noted.

**Reader's Score: 5**

**Continuation - Quality of the Continuation Plan**

**1. In determining the quality of the continuation plan, the Secretary considers the extent to which the eligible applicant is prepared to continue to operate the charter school that would receive grant funds in a manner consistent with the eligible applicant's application once the grant funds under this program are no longer available. (2019 NFP)**

**Strengths:**

The application clearly demonstrates how state funding will assume the costs of school operations as the number of pupils grow. A chart is presented on p. 24 which outlines the school's budget projections. The budget projections are not predicated on 1-time influxes of cash such as private donors but instead on reliable state aid. "89% of the Academy's annual funding is expected to come from the State and the Academy will be able to adequately operate the instructional programs based on this revenue." (p.23)

**Weaknesses:**

It is unclear how reliant upon the grant the school will be for recurring costs, given the amount of information provided within the narrative. It is unclear if the school has evidence that they will be able to meet extremely large first year enrollment targets.

**Reader's Score: 15**

**Selection Criteria - Quality of 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 following factors:**

**Reader's Score: 4**

**Sub**

- 1. (i) The extent to which the proposed project demonstrates a rationale (as defined in 34 CFR 77.1(c)) (up to 5 points). (34 CFR 75.210(c)(2)(xxix))**

**Strengths:**

A rationale is demonstrated for why the school is needed.

**Weaknesses:**

While the school puts forward a strong plan for the general launch and operation of the school, it does not articulate why the CSP grant is needed in order to launch its program. The expected outcomes therefore lack specificity.

**Reader's Score: 2**

- 2. (ii) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable (up to 5 points). (34 CFR 75.210(c)(2)(i))**

**Strengths:**

The goals are articulated in terms of the overall operation of the school. The logic model presents a framework for outputs that is consistent.

**Weaknesses:**

The goals are not articulated in reference to the grant funds or grant period. The Logic model lacks specificity in measure and timeline.

**Reader's Score: 2**

**Selection Criteria - Need for Project**

- 1. The Secretary considers the need for the proposed project. In determining the need for the proposed project, the Secretary considers one or more of the following factors:**

**Reader's Score: 24**

**Sub**

- 1. (i) The magnitude or severity of the problem to be addressed by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(i))**

**Strengths:**

The need for the school is articulated in terms of improving access to agricultural and energy programs (p.25)

**Weaknesses:**

The need is not framed in terms of students. While the need for jobs is clear, the proposal lacks specificity in describing how this affects students and families and/or the landscape for other educational options in the area.

**Sub**

**Reader's Score: 12**

**2. (ii) The magnitude of the need for the services to be provided or the activities to be carried out by the proposed project (up to 15 points). (34 CFR 75.210(a)(2)(ii))**

**Strengths:**

The application demonstrates that there is a high concentration of economically disadvantaged students in the community who are in need of new school options (p.27).

**Weaknesses:**

While the need is articulated in reference to a dysfunctional sending district, the proposal fails to make explicit reference to how it is designed to address these challenges and avoid the same pitfalls.

**Reader's Score: 12**

**Priority Questions**

**Competitive Preference Priority 1 - Competitive Preference Priority 1**

**1. Competitive Preference Priority 1—Promoting High-Quality Educator and Community-Centered Charter Schools to Support Underserved Students. (Up to 5 points).**

**1. Under this priority, an applicant must propose to open a new charter school, or to replicate or expand a high-quality charter school, that is developed and implemented—With meaningful and ongoing engagement with current or former teachers and other educators (0 or 1 point); and**

**2. Using a community-centered approach that includes an assessment of community assets, informs the development of the charter school, and includes the implementation of protocols and practices designed to ensure that the charter school will use and interact with community assets on an ongoing basis to create and maintain strong community ties. (Up to 2 points).**

**In its application, an applicant must provide a high-quality plan that demonstrates how its proposed project would meet the requirements in paragraph (a) of this priority, accompanied by a timeline for key milestones that span the course of planning, development, and implementation of the charter school. (Up to 2 points).**

**Strengths:**

Subfactor 1: 1pt

Strengths: Statements are made regarding engaging the community and educators. The founding team is made up of current/former educators and school leaders.

“Our core launch team is comprised of three leaders who have extensive experience in providing education to students in the Baton Rouge community.” (p.2).

One of the responsibilities of the Chief Schools Officer is to “Facilitate meetings with relevant stakeholder groups (teachers, parents, students)” (p.6).

Subfactor 2: 1pt

Strengths: A commitment to engage partners is articulated and board members represent many community organizations (1pt).

“Our schools are defined by our commitment to cultivating experiences and competencies related to jobs in high-demand

fields. As such, we seek out partnerships with local businesses, industry professionals, and organizations in the community that provide meaningful feedback and support that informs our curriculum, educational programs, and academic experiences. “ ( P.3).

The table on pages 16 & 17 demonstrates the diverse board, representing many community partners such as 100 Black Men of Greater Baton Rouge and The Arts Council of Greater Baton Rouge as well as University professors and staff. (p. 16-17).

Subfactor 3: 1pt

A high-level timeline is presented on pages 10 and 11.

**Weaknesses:**

Subfactor 1: There were no noted weaknesses.

Subfactor 2: While the application commits to community engagement, the work plan does not provide a detailed plan of how this engagement will take place.

Subfactor 3: The activities chart/timeline on pages 10 and 11 does not explicitly reference ongoing engagement with community partners or educators (outside of those who serve as members of the core founding team).

**Reader's Score: 3**

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**Status:** Submitted  
**Last Updated:** 08/24/2022 01:43 PM