

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

Status: Submitted

Last Updated: 08/03/2023 09:21 AM

Technical Review Coversheet

Applicant: Helix Community Schools (S282B230013)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	40	33
Sub Total	40	33
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	20	20
Sub Total	20	20
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	8
Need for Project		
1. Need for Project	30	26
Sub Total	40	34
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	4
Sub Total	5	4
Total	105	91

Technical Review Form

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

Reader #1: *****

Applicant: Helix Community Schools (S282B230013)

Questions

Selection Criteria - Quality of the Management Plan

1. (1) Quality of the Charter School's Management Plan (up to 40 points).

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: 33

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 proposal provides clarity and thoroughness through a detailed table (e18) that clearly outlines the roles and responsibilities of the leadership team. This comprehensive breakdown ensures a clear understanding of each team member's duties, fostering effective collaboration and accountability. Additionally, including a well-structured timeline (e21) further enhances the proposal's clarity by mapping out the areas of responsibility, the specific tasks required, and the expected completion dates. This timeline is a valuable tool for tracking progress and ensuring the project stays on course. With these planning elements in place, the proposal demonstrates a solid commitment to organization and transparency, instilling confidence in the project's potential success.

Weaknesses:

The provided timeline, while present, lacks essential milestones and deliverables. Although it outlines the processes required to accomplish tasks, it falls short in specifying the anticipated results of these actions. This omission raises concerns about the project's overall progress and impact assessment. To enhance the proposal's transparency and effectiveness, a more comprehensive timeline should be implemented, including clear milestones and deliverables, enabling a better understanding of the project's progress and outcomes.

Reader's Score: 7

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 applicant provides a budget narrative that provides a justification for each expenditure and links them to the project design and outcomes (e23).

Sub

Weaknesses:

The project proposal raises several concerns regarding clarity and specific details. The cost of adding just one grade and approximately 58 students appears to be disproportionately high, amounting to nearly [REDACTED] per student. Moreover, the lack of transparency in the school's annual budget makes it challenging to identify where funding gaps exist, justifying the request. Additionally, there is no clear explanation for why the operator managed to expand to the 7th grade without these funds but now requires them for the 8th-grade expansion.

Some of the costs outlined in the proposal appear unreasonable. For instance, requesting [REDACTED] of the principal's salary seems redundant since the school is presumed funded through the per-pupil model. Moreover, the grant timeline indicates that the school will open in the eighth-grade next year, with revenue expected from the state for the new students. This information raises questions about the necessity of certain activities outlined in the timeline that seems more relevant to starting a new school, even though the school has already been operational for two years.

Another concern is the funding requested for special education services, as the charter agreement states that the school is not responsible for covering these costs (e255). Without the school's budget, it is challenging to assess the overall reasonability of the expenses. The positions requested, such as the principal, four teachers, and a paraprofessional, are typically considered operating expenses covered by the per-pupil funding. However, the proposal lacks a clear explanation of how these staff members' total salaries fit into the grant budget and what specific grant-related activities they would be performing that are not already covered by the school's annual revenue. More detailed and transparent information is necessary to understand better and evaluate the project's funding request.

Reader's Score: 1

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 application provides clarity and details about the time commitment of the Project Director and the Executive Director, ensuring adequate effort to meet the project's objectives (e24). Additionally, the proposal includes the essential roles of a special education teacher, offering support to struggling students and a counselor dedicated to providing much-needed social-emotional support (e46). These well-defined staffing decisions demonstrate a comprehensive approach to addressing the diverse needs of the project and its participants, enhancing the overall effectiveness and potential for success.

Weaknesses:

No weaknesses found.

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:

The proposal emphasizes clarity and attention to detail by highlighting the key project personnel's relevant experience in implementing similar programs (e24). This valuable expertise assures a strong foundation for the project's success. Additionally, these key personnel's qualifications align with the program's desired outcomes, as evidenced by their specific skills and experiences (e25). This deliberate match between qualifications and program objectives enhances the project's credibility and its potential to achieve its intended results.

Sub

Weaknesses:

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 proposal provides clarity and detailed plans regarding financial management. The financial manager's role centers around establishing robust accounting and control systems (e30), ensuring a sound financial foundation for the project. Moreover, the Board's finance committee will be responsible for fiscal oversight, diligently supervising the annual budget and financial statements, reviewing accounting practices, and organizing the annual audit (e31). This rigorous oversight guarantees the project's financial integrity and accountability. Notably, the applicant demonstrates a proactive approach by utilizing specialized software configured to comply with the state's accounting requirements (e31), streamlining financial processes and enhancing accuracy. These comprehensive financial measures ensure transparency, effective governance, and responsible handling of resources.

Weaknesses:

No weaknesses found.

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 proposal presents a clear and detailed approach to leadership and academic support. A well-defined leadership model categorizes programmatic decisions into operations, academics, and project oversight (e32). This organized structure ensures effective decision-making and accountability throughout the project. Additionally, the proposal includes a comprehensive academic support model, incorporating diagnostic assessments, Professional Learning Communities (PLCs), and mentoring to cater to students' diverse needs (e58). This model showcases a thoughtful and holistic approach to enhancing academic performance and support.

Furthermore, the application features a carefully designed curriculum plan, providing a thorough outline of the educational content and objectives (e61). This detailed curriculum plan underscores the applicant's commitment to delivering a well-structured and impactful educational experience. The clarity and specificity of these components contribute to the overall strength of the proposal.

Weaknesses:

No weaknesses found.

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 proposal provides a fully developed response. The financial manager's experience in serving charter schools, including the applicant's other charter schools, adds expertise and familiarity with the unique financial needs of such

Sub

institutions (e28). Including a comprehensive table listing the Board of Directors and their relevant skills and experiences ensures transparency and accountability in the governance structure (e30). The governance model described in the application incorporates metrics that not only gauge student progress toward graduation but also emphasize a supportive and diverse student culture, along with efficient and sustainable operations (e33). Moreover, the proposal outlines an annual in-depth analysis of program data to develop improvement plans for the coming year, highlighting a commitment to continuous enhancement and growth (e34).

Another aspect is the applicant's well-defined intervention process, which includes a performance plan with identified success benchmarks and a proactive approach to resolving any arising issues (e34). Finally, the application incorporates quality controls and charter agreement requirements, encompassing accountability measures, performance goals, and statewide assessments (e50).

Weaknesses:

No weaknesses found.

Reader's Score: 5

Continuation - Quality of the Continuation Plan

1. (2) Quality of the Continuation Plan (up to 20 points).

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 proposal provides clear and detailed financial projections, highlighting the applicant's confidence in the project's sustainability beyond the grant period. It is stated that per-pupil revenues from the state will be sufficient to maintain the grant after its completion (e35). Anticipating an increase of 58 students, bringing the total number of seats to 130, the applicant expects over [REDACTED] in funding for each student (e36). The project's sustainability will also be bolstered by supplemental federal funding sources like Title I and the School Lunch Program (e36). The applicant's careful financial planning is evident as they predict funding surpluses through FY25, indicating a well-managed and financially stable project (e36). Throughout the grant, the financial projections consistently show a surplus of funds for the initial three years, accounting for the additional revenue generated from enrolling the 58 new students (e36).

Weaknesses:

No weaknesses found.

Reader's Score: 20

Selection Criteria - Quality of Project Design

1. (3) Quality of the Project Design (up to 10 points).

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: 8

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 offers clear and detailed support for the program's rationale by implementing a detailed logic model (e312). This logic model serves as a structured framework, outlining the program's goals, activities, and expected outcomes and providing a well-reasoned foundation for the project's purpose. Also, the applicant presents diverse educational frameworks encompassing science, problem-based learning, and immersion (e38). These frameworks are thoughtfully selected to enhance the program's effectiveness and cater to a broad spectrum of learning needs and styles. Including these educational frameworks demonstrates a comprehensive approach to curriculum design, ensuring participants' engaging and impactful learning experience. The clarity and attention to detail in supporting the program's rationale and curriculum design contribute to the overall strength and credibility of the proposal.

Weaknesses:

The proposal lacks clarity in explaining why the stated goals require grant funds, as many of the listed activities and outcomes are already being addressed by the school. Given the school's relatively short operational history of just two years, it is challenging to comprehend the rationale behind requesting funds for updating procedures and program evaluation and monitoring, which were recently implemented. Without a clear and detailed explanation of the specific needs and gaps the grant funds would address, it becomes difficult to assess the proposal's justification for additional financial support. A more thorough and transparent rationale is necessary to provide a compelling case for the grant's necessity and its potential impact on enhancing the school's operations and outcomes.

Reader's Score: 3

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 proposal demonstrates clarity and attention to detail in multiple aspects of performance assessment. A comprehensive table of performance measures and a well-defined schedule for data collection are thoughtfully included (e39). This table is a valuable tool for tracking progress and evaluating the program's success. Also, the proposal identifies specific targets for subgroups, such as special education students and English Language Learners, showing a commitment to addressing the unique needs of diverse student populations (e39). Additionally, performance targets for academics, management and operations, and financial management are explicitly outlined, providing a clear roadmap for success in these critical areas (e41). By setting clear and measurable objectives, the proposal strongly focuses on accountability and a well-structured approach to continuous improvement.

Weaknesses:

No weaknesses found.

Reader's Score: 5

Selection Criteria - Need for Project

1. (4) Need for Project (up to 30 points).

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: 26

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 proposal provides some evidence related to the magnitude of the problem, with the school serving 85% economically disadvantaged students (e42). This data highlights the sizable portion of the student population facing economic challenges. Additionally, the communities served by the school show high levels of food insecurity, with some of the highest rates in the country (e44). This crucial detail emphasizes the urgent need for support and resources. The clarity and specificity of this data contribute to a comprehensive understanding of the applicant's target population and the critical issues they face.

Weaknesses:

The proposal lacks clarity and specific details regarding the magnitude of the problem. While it describes the student's socio-economic status, it fails to explain the severity of the academic issues comprehensively. There is a notable absence of data to support the need for the proposed program, and academic or behavior-related data are not utilized to demonstrate how the project would effectively address and improve the identified problems. The proposal would benefit from a more data-driven approach, employing relevant academic and behavioral data to highlight students' specific challenges and how the proposed project would serve as a suitable solution. The proposal can strengthen its case and foster confidence in its efficacy by incorporating detailed information and using data to underscore the program's necessity and potential impact.

Reader's Score: 11

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 proposal provides information about the challenges the target community's schools face. Notably, 55% of the students attending these schools lack access to the necessary skills they need (e45). Additionally, a concerning 70% of the city's failing schools, rated D and F, are concentrated in the school's neighborhood (e45). These data points offer a comprehensive understanding of the severity of the educational issues in the community. In response to the significant number of struggling students, the plan includes the essential roles of a special education teacher and a counselor (e46). Also, the proposal identifies a need for high-quality, non-selective schools in the community (e47), underlining the importance and relevance of the proposed project.

Weaknesses:

No weakness found.

Reader's Score: 15

Priority Questions

CPP - Competitive Preference Priority

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

(a) 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—

(1) With meaningful and ongoing engagement with current or former teachers and other educators; 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.

(b) 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.

Strengths:

The organization's executive director brings valuable experience as a former educator (e16). The Board of Directors also consists of individuals with educational backgrounds (e16), contributing their expertise to the organization's mission. In the management plan, there is a clear emphasis on community asset mapping, ensuring a comprehensive understanding of the resources available. The applicants have a well-thought-out approach that involves conducting quarterly and annual surveys and holding informative sessions (e17). Additionally, to gather important input, parent feedback is actively sought quarterly through family surveys (e53). These measures highlight the organization's commitment to transparency, stakeholder involvement, and informed decision-making.

Weaknesses:

The applicant's proposal lacks clarity regarding engagement with current teachers, as no specific plans or strategies are outlined for involving them in the program. Furthermore, there is a notable absence of a systematic approach for incorporating community input, leaving uncertainty about how the perspectives and needs of community members will be integrated into the project. Also missing is the lack of any description regarding the measures that will be taken to maintain strong community ties throughout the implementation and duration of the initiative. These omissions raise essential questions about the applicant's commitment to fostering meaningful relationships with teachers and the broader community.

Reader's Score: 4

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Technical Review Coversheet

Applicant: Helix Community Schools (S282B230013)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	40	40
Sub Total	40	40
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	20	20
Sub Total	20	20
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	10
Need for Project		
1. Need for Project	30	30
Sub Total	40	40
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	5
Sub Total	5	5
Total	105	105

Technical Review Form

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

Reader #2: *****

Applicant: Helix Community Schools (S282B230013)

Questions

Selection Criteria - Quality of the Management Plan

1. (1) Quality of the Charter School's Management Plan (up to 40 points).

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: 40

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 applicant provided a management plan with time and within budget, clearly defined responsibilities, timelines and milestones for accomplishing project tasks. For instance, starting on page e18, the applicant provided an outline of the roles, responsibilities, timelines and milestones for the upcoming three years. The chart provided included the role and responsibilities for the executive leadership team involved in the school's operations. For example, the executive director is responsible for providing oversight, leadership and support in all phases of implementing the project and providing feedback to develop professional skills as well as utilizing a research-based framework tool to coach and supervise teachers. The School Principal will set the overall academic mission and vision of the school and serve as key communication lead for all communications with school employees. Additionally, the applicant provided a table with a timeline for operations that included each individual category, the task/action and the estimated dates of implementation. Each section was divided into year one, two, and three. The categories included operations and finance, marketing and recruiting, human resources, instruction, and facilities.

Weaknesses:

No weaknesses identified.

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))

Sub

Strengths:

The applicant provided a complete narrative with costs that are reasonable in relation to the objectives, design, and potential significance of the proposed project. For instance, starting on page e315, the applicant gave a detailed budget rationale for the expenditures of the project. Included in the rationale was personnel salary, and travel. Additionally, the applicant includes financial addendum that included the independent auditor's report, a statement of financial position, statement of activities, statement of cash flows, statement of functional expenses and note to financial statement. The applicant also included a schedule of compensation, benefits, and other payments.

Weaknesses:

No weaknesses identified.

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))**

Strengths:

The applicant provided a narrative that included the time commitments of the project director and other key project personnel. The information provided was appropriate and adequate to meet the objective. For instance, the time commitment of the project director was listed as 20% for planning purposes. The time commitment of the president and executive director was listed as 25% for the administration of the project. The financial manager will dedicate 25% of the time to financial management and the school principal has a time commitment of 100% to oversee all school operations.

Weaknesses:

No weaknesses identified.

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:

Starting on page e24, the applicant provided qualifications, including relevant training and experience of key project personnel. Some of the personnel listed included the president who has over eight years of teaching experience and 25 years working at a law firm. The executive director has over 30 years' experience in education with 13 of them as a classroom teacher. The principal of the school has experience in administration, curriculum development instructional strategies and professional development.

Weaknesses:

No weaknesses identified.

Sub

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 provided proof in their plan that they would maintain control over all CSP grant funds. For instance, starting on page e30, the applicant provided the plan on the strategies they would use to accomplish the task. Some of the strategies included the financial manager reporting to the governing board and the president, and working with the school's operational and financial team and the board's finance committee to oversee the finances. Activities to be completed by the team included reviewing and approving the annual budget, reviewing financial statements on a monthly basis and ensuring the proper financial and accounting practices in compliance with all regulations. Additionally, there is a CPA firm that audits the financial records including payroll and grants.

Weaknesses:

No weaknesses identified.

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 applicant provided a detailed narrative on how they will make all programmatic decisions. For instance, starting on page e32, the applicant outlined the teams that make the programmatic decisions. Those teams were the executive team and the instructional team. The executive team consists of the president, the executive director, and the operations team. The role of the team is to oversee the operational, administrative, and developmental functions and report to the board. The instructional team is managed by the executive director and the school principal. The role of the instructional team is to plan the academic program and make curricular decisions. Members of the instructional team include the department chairs, teachers, and teaching assistants.

Weaknesses:

No weaknesses identified.

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 applicant provided a narrative demonstrating that they would administer or supervise the administration of the grant including maintaining management and oversight responsibilities over the grant. For example, starting on page e33, the applicant stated that the board of directors and the executive leadership team will oversee the program. There are clear systems to assess the operations, finances and academic achievement of the school. A detailed chart was provided with the names of the current members of the board, their professional affiliations and skill sets.

Sub

Weaknesses:

No weaknesses identified.

Reader's Score: 5

Continuation - Quality of the Continuation Plan

1. (2) Quality of the Continuation Plan (up to 20 points).

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 applicant provided a narrative that demonstrated how the 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 are no longer available. For example, the applicant stated on page e35 that they would be able to sustain operations through the funding that is provided by the state. The applicant is anticipating that they will have a total of 130 students starting the 2023-2024 school year and will be able to maintain that enrollment through the 2025-2026 school year. They will also use funding from several Federal Programs including Title 1 and Title II, private and public grants, and private contributions. A detailed financial projection was provided that included total projected revenue, total projected expenses and projected operating surplus for the beginning of FY 2023 through end of FY 2026.

Weaknesses:

No weaknesses identified.

Reader's Score: 20

Selection Criteria - Quality of Project Design

1. (3) Quality of the Project Design (up to 10 points).

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: 10

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))**

Sub

Strengths:

The applicant provided a complete rationale for the proposed project. For example, on page e312, the applicant included a logic model with inputs, activities, outputs, and outcomes for short term, medium term and long term. One of the activities included was to implement tier 1 curriculum and aligned assessment with rigor and fidelity and provide initial and ongoing content specific PD for teachers. Another activity listed was to increase engagement with community partners, key stakeholders and community members. This will be accomplished through partnerships, volunteer opportunities, fundraising, and townhall meetings.

Weaknesses:

No weaknesses identified.

Reader's Score: 5

- 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 provided goals, objectives and outcomes that are clearly specified and measurable. For instance, on page e317, the applicant included a chart with the project objectives and performance measures. Some of the objectives listed were for students to meet growth and proficiency goals on the end of year assessment, to increase teacher retention and the percentage of teachers showing growth and receiving highly effective ratings on observations and to meet annual enrolment targets.

Weaknesses:

No weaknesses identified.

Reader's Score: 5

Selection Criteria - Need for Project

- 1. (4) Need for Project (up to 30 points).**

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: 30

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))**

Sub

Strengths:

The applicant provided a narrative providing the magnitude or severity of the problem to be addressed by the proposed project. For instance, starting on page e42, the applicant provided the characteristics of the target population to include the percentages of students who were classified as economically disadvantaged, student of color, students with disabilities, English learners and proficiency levels on LEAP. The Economically disadvantaged numbers for Elementary and Middle school was at 85.5% compared to the target area Elementary and Middle schools at 95.8%. The Proficiency of LEAP was 33.2% at all elementary/middle schools compared to 22.5% at the targeted area for Elementary/Middle schools. Additionally, the applicant listed the food insecurity index for the target area with indexes range of 81.3 to 99.1 making the target area the highest for food insecurity in the US.

Weaknesses:

No weaknesses identified.

Reader's Score: 15

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 applicant provided a narrative that stated the need for the services to be provided and the activities to be carried out by the proposed project. For instance, starting on page e45, the applicant stated that the targeted area lags in the state average in every major performance metric including standardized test scores, graduation rate and student progress. Additionally, they stated that out of the 14 schools in the target area, 9 of them have letter grades of D or F. 55% of the students are attending schools that are not providing them with the skills necessary to excel.

Weaknesses:

No weaknesses identified.

Reader's Score: 15

Priority Questions

CPP - Competitive Preference Priority

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

(a) 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—

(1) With meaningful and ongoing engagement with current or former teachers and other educators; 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.

(b) 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.

Strengths:

a. (1) The applicant provided documentation that they had meaningful and ongoing engagement with current or former teachers and educators as well as usage of a community-centered approach. For example, the applicant provided the background information on the school leadership team starting on page e16. The President and Executive Director have experience in education and as members of various education-related committees and organizations. The executive director has 30 years of educational experience with 13 of them as a classroom teacher while the president has been teaching at the local university and has served in various education-related committees and organizations. The applicant also stated that the board of directors is made up of former educators from the community.

a. (2) The applicant provided a community-centered approach that includes an assessment of community assets, development of the charter school and implementation of protocols and practices. For instance, starting on page e16, the applicant stated that they would use an assessment of the community assets and the implementation of practices. They will continuously consult with the local community through partnerships with local business, industry professionals, and community organizations. Additionally, they will incorporate engagement activities with the community such as quarterly and annual surveys, townhall meetings, information sessions and community events at local parks, libraries and churches.

b. The applicant provided a high-quality plan with the requirements of priority, timeline for key milestones that span the course of planning, development and implementation of the charter school. For example, within the management plan, the applicant provided a project at a glance timeline that included the timeline for planning, development and implementation with a focus on key milestones for obtaining feedback from the community. Some of the activities listed included development of marketing and recruiting events to include school visits, direct mail, radio, billboards and other signage, canvassing and community outreach events.

Weaknesses:

No weaknesses identified.

Reader's Score: 5

Status: Submitted
Last Updated: 08/02/2023 10:17 PM

Status: Submitted

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Technical Review Coversheet

Applicant: Helix Community Schools (S282B230013)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	40	35
Sub Total	40	35
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	20	19
Sub Total	20	19
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	7
Need for Project		
1. Need for Project	30	29
Sub Total	40	36
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	4
Sub Total	5	4
Total	105	94

Technical Review Form

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

Reader #3: *****

Applicant: Helix Community Schools (S282B230013)

Questions

Selection Criteria - Quality of the Management Plan

1. (1) Quality of the Charter School's Management Plan (up to 40 points).

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: 35

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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 narrative outlines the roles and responsibilities of key personnel involved in the project by providing a comprehensive table that defines each personnel. Each role is well-defined, and it highlights the specific tasks and areas of responsibility for each member of the team. The management plan covers critical areas of school development, including academics, finance, operations management, facilities, and board governance. The narrative also includes a detailed timeline with specific tasks and actions, ensuring that the project is well-structured and coordinated. The narrative also mentions regular planning meetings with stakeholders, such as community leaders, board, and school leaders. This highlights a commitment to monitoring progress and maintaining open lines of communication with stakeholders ("Facilitate regular planning meetings with stakeholders such as community leaders, Board, and school leaders.")

Weaknesses:

The narrative describes the duties of financial management, but it doesn't go into great detail on the budget, including predicted expenses and how those costs will be managed. The management plan's effectiveness would increase with greater budgetary transparency. The management plan is well-organized and extensive, with distinct roles, deadlines, and completion dates. The funds and its impact on the estimated project time are simply not mentioned in the narrative. The items mentioned are positions that should already have funding allocated for.

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:

The narrative provides a solid foundation for understanding the roles and responsibilities of key personnel in the management of HLA. However, it would benefit significantly from including more detailed information about the

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qualifications of project personnel and a thorough discussion of the project's costs and their relation to the objectives and potential impact of the proposed project.

Weaknesses:

There is a lack of information explaining the reasonableness of the costs in relation to the project's objectives, design, and potential significance. While it mentions the anticipated costs and budget associated with this project are discussed in greater detail in the Budget Narrative, they are not highlighted in the narrative despite the fact that the narrative highlights a section to elaborate on this further.

Reader's Score: 3

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 narrative provides specific and quantifiable information on the time commitments of key project personnel, including the Project Director, President, Executive Director, Financial Manager, and School Principal. The time commitments allocated for each key personnel seem appropriate and adequate, taking into account their roles and responsibilities in the successful administration of the project.

The citation from the text also shows that key project personnel have prior experience in executing similar projects, which adds credibility to their ability to handle the responsibilities effectively.

Weaknesses:

While the narrative mentions the successful launch and management of HLA to date, it could benefit from providing more detailed evidence of their past achievements and contributions to previous projects. The main weakness is the lack of detailed information about the project's specific objectives and how the time commitments are broken down when mentioning key personnel alignment and their objectives. Without this information, it is difficult to fully evaluate the extent to which the time commitments are appropriate and adequate. Providing more context and alignment between time commitments and project objectives would strengthen the reasoning behind their appropriateness. The narrative could have included a breakdown of the project and the roles of the project director, principal investigator and key project personnel similar to the way it provided a "project timeline at a glance", in the earlier text to give clarifying meaning to the percentage of time that will be allocated by the project director, executive director, financial manager, and principal.

Reader's Score: 4

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:

The narrative provides detailed and relevant information about the qualifications and experience of key project personnel, including their educational background, work history, and specific accomplishments. The qualifications of key project personnel align well with their respective roles and responsibilities in the successful administration of the project. The inclusion of specific achievements and contributions of key project personnel, such as successful grant proposals and past leadership roles, adds credibility to their abilities as well. Additionally, the narrative highlights that the President, Executive Director, and the School Principal, have successfully executed similar projects, including the launch and management of charter schools in Baton Rouge, Louisiana. This indicates their ability to handle similar projects effectively.

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Weaknesses:

There are 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 narrative clearly outlines the steps taken by Helix Community Schools to maintain control over all CSP grant funds. It demonstrates a well-organized and comprehensive approach to financial stewardship. The establishment of a Finance Committee appointed by the Board ensures fiscal accountability and transparency, adding an extra layer of oversight to the management of grant funds.

The use of MIP Fund Accounting software is also evident in the text; configured in accordance with the Louisiana Accounting Uniform Governmental Handbook (LAUGH) system, shows a commitment to proper financial reporting and compliance with regulations. Lastly, the mention of the involvement of a qualified CPA firm to handle annual audits and tax returns ensures an objective and professional assessment of financial records was also addressed.

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)

Strengths:

The narrative outlines the leadership model used by Helix Community Schools, including the roles and responsibilities assigned to key project workers, in a clear and orderly manner.

There is a significant commitment to ensuring accountability and efficient decision-making processes as seen by the division of decision-making responsibilities for each function within the Executive Team and Instructional Team. The addition of department chairmen to the Instructional Team provides a new level of collaboration and subject matter expertise to choices about curriculum. This enhances the inclusivity of decision-making, allowing for input from various stakeholders and subject matter experts. Lastly, the mention of the President's role in overseeing operational, administrative, and developmental functions indicates a high-level involvement in programmatic decisions, ensuring a focus on the long-term health of Helix Community Schools.

Weaknesses:

There are 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 narrative presents a thorough strategy for managing and overseeing the grant, demonstrating a firm commitment to control and accountability. The Board of Directors and the Executive Leadership Team's participation in the oversight procedure guarantees that decisions are made with the direction of multiple levels of

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competence. This demonstrates a clear leadership model, with key personnel, including the President, Executive Director, and Operations Team, responsible for different aspects of the school's operations. This structured leadership approach can help ensure effective administration and supervision of the grant. A proactive attitude to continuous improvement can be shown in the creation of clear mechanisms for routine evaluation of operations, finances, academic accomplishment, and leadership performance. "At the end of the calendar year meeting, board members engage with data related to the metrics described above according to their division of expertise. Following analysis of the various data presented, the board charges the President to develop plans to address the areas identified for improvement." The presence of an intervention process, triggered if progress towards improvement goals is not adequate, indicates a proactive approach to address any management deficiencies and ensure grant objectives are met.

Weaknesses:

There are no weaknesses noted.

Reader's Score: 5

Continuation - Quality of the Continuation Plan

1. (2) Quality of the Continuation Plan (up to 20 points).

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 narrative outlines multiple funding sources, including state funding through the Minimum Foundation Program (MFP), federal programs (Title I, II, IV, ESSER II & III), and private contributions. This diversified funding approach ensures financial stability. The narrative also provides enrollment projections for the next few years, demonstrating the charter school's growth plans and potential for increased revenue. Additionally, the proposal has a table highlighting its financial projects over the next 3 years. The projections show a surplus in operating funds, indicating the school's ability to manage its budget effectively. The narrative demonstrates strong financial planning and projection, ensuring the school's ability to sustain operations beyond the grant period. The use of multiple funding sources, including state aid and federal programs, contributes to its strength. The enrollment projections and surplus in the financial projections further enhance its credibility.

Weaknesses:

While the school anticipates receiving [REDACTED] of its funding from the state, it might be vulnerable to changes in state funding policies or budget cuts. The narrative mentions receiving funds from various federal programs, but there's no elaboration on the certainty of receiving those funds in the future. Reliance on federal programs can introduce risks if funding conditions change. There is mention of private contributions in the text as a funding source, but it lacks details on how the school plans to secure these contributions or the expected amount. The limited explanation of private contributions should be further elaborated on. Furthermore, the financial projections are based on an increase in enrollment by 58 students for the 2023-2024 school year. Relying heavily on enrollment projections may pose a risk if actual enrollment deviates significantly from the projected numbers. The narrative should address potential risks associated with enrollment projections and uncertainties in federal funding to strengthen the plan's overall adequacy. A well-rounded plan that accounts for contingencies will enhance the charter school's ability to sustain operations beyond the grant period.

Reader's Score: 19

Selection Criteria - Quality of Project Design

1. (3) Quality of the Project Design (up to 10 points).

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

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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 narrative provides a clear rationale for the proposed project, explaining how the governance systems are informed by high-quality charter school criteria, state metrics, and the school's unique mission of preparing students for college, career, and citizenship. ("The governance systems created by the Board are informed by the criterion of high-quality charter schools described in the Charter School Performance Compact, the metrics used by Louisiana to determine School Performance Score, and the unique mission of HLA is to prepare students for college, career, and citizenship.") The narrative also explains how the proposed project is grounded in educational research, utilizing educational frameworks like Informal Science Learning, Problem-Based Learning (PBL), and Immersive Learning. These frameworks enhance STEM education methods and critical thinking skills. Lastly, the text includes a logic model with specific performance measures, which allows for clear tracking of progress and success throughout the grant period. The data collection and evaluation process ensures ongoing monitoring.

Weaknesses:

A weakness is the lack of specific metrics to measure the achievement of the foundational goals and the limited evidence of HLA's previous success in implementing the educational frameworks. Providing concrete evidence of successful implementation and using specific metrics for evaluation would enhance the narrative's effectiveness in demonstrating the rationale behind the proposed project. Outcomes and performances already being executed by the school which makes room to question how the grant would justify the need for the grant.

Reader's Score: 3

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 narrative outlines precise, quantifiable objectives for the suggested endeavor. It identifies three fundamental objectives for academic achievement, corporate culture, and operational and financial effectiveness. It also contains a thorough table of performance metrics that are directly linked to the project's anticipated results. The inclusion of a logic model in the application further strengthens the clarity of the proposed project's goals, objectives, and outcomes. The logic model identifies data collection methods and the rationale for each metric as critical predictors of success in achieving their mission. Additionally, the frequency of data analysis for each performance measure, indicating a well-planned and ongoing monitoring process was clearly specified.

Weaknesses:

While the narrative mentions the frequency of analysis for each performance measure, it lacks specific details on the data collection methods and tools that will be used. Providing more information on how the data will be

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collected, who will be responsible for collecting it, and the tools used for analysis would enhance the clarity and measurability of the outcomes.

Reader's Score: 4

Selection Criteria - Need for Project

1. (4) Need for Project (up to 30 points).

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: 29

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 text provides comprehensive data on the student demographics and socioeconomic challenges faced by the community. It includes statistics on poverty levels, food insecurity index, and academic performance, demonstrating the severity of the problem. Additionally, data was clearly cited and explained throughout. By comparing the demographics and challenges of HLA's student population with other schools in the local district and neighboring zip codes, the narrative effectively highlights the magnitude of the problem and the higher needs of HLA's students compared to others. The narrative identifies HLA's student population as over 85% economically disadvantaged, primarily consisting of students of color, with a significant percentage having disabilities and English Learners.

Weaknesses:

There are no weaknesses noted.

Reader's Score: 15

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 narrative provides detailed data on the student demographics, poverty levels, food insecurity, and academic performance, which effectively highlight the magnitude of the need for services in the community. The data demonstrates that a significant majority of HLA's student population comes from economically disadvantaged backgrounds and face various challenges. (Data on poverty levels and food insecurity from the American Community Survey and the Conduent Healthy Communities Institute). Student data demonstrating how HLA students rank socioeconomically as being of higher need than students in the surrounding districts was provided. By comparing HLA's student body composition with other schools in the local district and neighboring zip codes, the narrative emphasizes that HLA's students rank socioeconomically as being of higher need than students in the surrounding districts. This comparison adds strength to the argument for the magnitude of the need for services. The narrative also cites research demonstrating that students who are "at risk" due to socioeconomic challenges are more likely to face issues in academic performance, cognitive development, and educational success. It emphasizes the importance of addressing these challenges to support successful transitions to adulthood. ("Research demonstrates that students who are "at risk" are more likely to have attention and behavioral issues..." –

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pg 31).

Weaknesses:

Although the narrative provides information on the population with high needs, it is not clear how these high needs elements directly affect student performance. The narrative would be strengthened by more explanation of how these difficulties impact academic achievement, educational success, and other crucial areas. By doing so, the idea would be strengthened even further and a clear strategy for reducing the problem's severity would be shown. The case for the need for services would be strengthened if the narrative included particular academic performance statistics, comparisons with nearby schools, and an explanation of how the assistance being requested would improve student outcomes.

Reader's Score: 14

Priority Questions

CPP - Competitive Preference Priority

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

(a) 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—

(1) With meaningful and ongoing engagement with current or former teachers and other educators; 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.

(b) 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.

Strengths:

The proposal has several strengths within the text including highlighting its qualified core leadership team and board of directors with extensive education experience. For example, the President has over 20 years of teaching experience, and Executive Director brings 30 years of education expertise to the team. The plan also prioritizes engaging the local community, including parents, families, and local industry, to shape the school's programs and curriculum as stated in the text, "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." Lastly, the proposal includes a clear "Project at a Glance Timeline" that outlines key milestones for planning, development, and implementation. This structured timeline ensures regular community engagement throughout the process ("As outlined in our Charter School Management Plan below, we include a 'Project at a Glance Timeline' which details our timeline for planning, development, and implementation and includes key milestones for soliciting and obtaining feedback from the community."). The narrative also mentions that Helix Community Schools (HLA) operates with meaningful and ongoing engagement of highly qualified individuals, including teachers and educators. The core leadership team, led by the President and Executive Director, have extensive experience in education, with their personnel having 30 years of experience as a classroom teacher. This demonstrates the school's commitment to involving educators in the decision-making process and utilizing their expertise.

Weaknesses:

The proposal lacks specific details or evidence on how ongoing engagement with teachers and community stakeholders will be implemented beyond general statements ("Meaningful and Ongoing Engagement with Teachers and Other Educators: Helix proposes to operate HLA with meaningful and ongoing engagement of highly qualified individuals, including teachers and educators..."). It would be stronger with more concrete plans and strategies for continuous involvement and collaboration with these key stakeholders.

Reader's Score: 4

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