

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

Status: Submitted

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Technical Review Coversheet

Applicant: American Heritage Charter School (S282E230007)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	14
Sub Total	20	14
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	35	28
Sub Total	35	28
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	10	10
Sub Total	10	10
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	9
Need for Project		
1. Need for Project	25	19
Sub Total	35	28
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	83

Technical Review Form

Panel #1 - CSP Developers Replication Panel - 1: 84.282E

Reader #1: *****

Applicant: American Heritage Charter School (S282E230007)

Questions

Quality of the Eligible Applicant - Quality of the Eligible Applicant

1. (1) Quality of the Eligible Applicant (up to 20 points).

In determining the quality of the eligible applicant, the Secretary considers the following factors:

Reader's Score: 14

Sub

1. (i) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates and where applicable and available, student academic growth, high school graduation rates, postsecondary enrollment and persistence rates, including in college or career training programs, employment rates, earnings and other academic outcomes) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students served by other public schools in the State (up to 5 points). (2019 NFP)

Strengths:

Applicant details a track record of outperforming the district and state on annual test scores. (See page e19)

Applicant names a waitlist of 200 students to attend which demonstrates strong demand. (See page e19)

Applicant names that their authorizer has recognized them as either meeting or exceeding academic standards in math, science, and reading. (See page e21-e28)

Applicant's graduation rate has been higher than the district and has exceeded or matched the state. (See page e30).

Weaknesses:

Applicant names that they do not serve a population that is comparable to the school district regarding underserved students. (See page e20)

Applicant details how they have attempted to attract a larger and more diverse student population since 2013 of both low-income and special education students (see page e20). However, these gains appear modest – with about 5% more non-white and special needs students and no change in the percentage of economically disadvantaged students. Additionally, ELL student population has grown from none to only 4%. (See page e19)

Applicant provides no comparison data for retention or attendance.

Reader's Score: 3

2. (ii) **The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation (up to 5 points). (2019 NFP)**

Strengths:

Applicant details that they consistently receive “clean audits with no material findings.” (See page e31)

Applicant cited they are in good standing that would not lead to having a charter revoked due to noncompliance with statutory or regulatory requirements. (See page e31)

Weaknesses:

Applicant does not indicate if any charter schools have been revoked from their broader organization.

Reader's Score: 3

3. (iii) **The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter (up to 5 points). (2019 NFP)**

Strengths:

Applicant provides an overview that there have been no financial, operational, or safety concerns and “exceeds standards” in relation to nine financial areas. (See page e30)

Applicant details that they consistently receive “clean audits with no material findings.” (See page e31)

Applicant has a previous 2018 expansion grant that has been successful and proposes essentially doubling in scale from 128 high school students to 310 students. (See page e33)

Weaknesses:

Applicant names that they have not met all of the operational standards. (See page e30)

Reader's Score: 4

4. (iv) **The extent to which the schools operated or managed by the applicant demonstrate strong results on measurable outcomes in non-academic areas such as, but not limited to, parent satisfaction, school climate, student mental health, civic engagement, and crime prevention and reduction (up to 5 points). (2019 NFP)**

Strengths:

Applicant highlights strong results on non-academic outcomes highlighting that more than 80% of students feel safe at school. (See page e31)

Applicant highlights positive staff survey results that they feel appropriately supported and resourced within a

Sub

positive school environment. (See page e32)

Applicant highlights strong results on non-academic outcomes highlighting that more than 80% of students feel safe at school. (See page e31)

Applicant highlights positive staff survey results that they feel appropriately supported and resourced. (See page e32)

Weaknesses:

Non-academic measures such as civic engagement, student mental health, and crime prevention and reduction are not adequately addressed.

Reader's Score: 4

Selection Criteria - Quality of the Management Plan

1. (2) Quality of the Charter School’s Management Plan (up to 35 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: 28

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 5 points). (34 CFR 75.210(g)(2)(i))

Strengths:

Applicant provides an overview that there have been no financial, operational, or safety concerns and “exceeds standards” in relation to nine financial areas. (See page e30)

Applicant names that have “met” or “exceeds standard” on six of seven operational standards and resolved their “approaching standard” in less than one month. (See page e30)

Applicant details that they consistently receive “clean audits with no material findings.” (See page e31)

Applicant has a previous 2018 expansion grant that has been successful and proposes essentially doubling in scale from 128 high school students to 310 students. (See page e33)

Applicant provides a clear timeline from October 2023-September 2028 with an overview of tasks, timelines, and personnel. (See page e48)

Applicant provides a budget that adequately addresses personnel salaries (See budget narrative – see page e241)

Sub

Weaknesses:

Applicant names that they have received high marks from their authorizer but does not explain what criteria are used or what these high marks entail. Applicant provides only a vague description. (See page e30)

Applicant does not provide a clear overview of the "Administrative Team" and "Community Outreach" personnel. (See page e34-48)

Reader's Score: 3

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:

Applicant describes key activities necessary for their expansion appropriately include hiring new staff and providing them with professional development, efforts to recruit and enroll students, and purchasing furniture, technology, supplies, and equipment for our educational and extracurricular activities. Applicant's budget narrative demonstrates and details that these costs are based on reasonable estimates of current market value. (See page e39 and budget narrative e241)

Weaknesses:

No weaknesses found.

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:

Some detail is provided about the project director and principal investigator's time commitment to the project. (See pages e39-40)

The project manager will spend [REDACTED] of their time to support the expansion of the school. (See page e39)

Weaknesses:

Applicant does not provide a convincing and clear plan for the necessary staff and time commitment to expand the school. (See pages e39-40)

Applicant names that the grant administrator is the head of the board, and he is not an actual staff member. The applicant names the grant administrator will only spend [REDACTED] of his time on the school expansion which is not sufficient. (See pages e39-40).

Reader's Score: 2

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

Sub

Strengths:

The head administrator will serve as the project manager, and she has 20+ years of experience as an educator. (See page e42)

The qualifications of the grant administrator are strong in terms of his resume. (See page e42)

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:

Applicant details that: "AHCS will secure multiple bids for each purchase based on the purchase amount, per required purchasing procedures." (See page e43)

Applicant describes that any purchase above \$ [REDACTED] will be inventoried, inspected, and maintained on a list. (See page e43)

Applicant possesses previous federal grant administration including a previous replication and expansion grant in 2018 and notes that three different checks will be in place to approve expenditures. (See page e43)

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:

Applicant names that the Head Administrator and Secondary Principal will make all programmatic decisions. (See page e43-44)

Applicant effectively describes which decisions have already been made, such as, the grade levels to expand, the projected enrollment, the curriculum, and the classroom locations. The applicant describes what additional decisions will be left for the secondary principal to decide, such as, whom to hire for teaching positions, what professional development teachers need for their growth, what researched-based instructional practices to implement, what extracurricular activities will be offered, and how best to design the school's culture. (See page e44)

Weaknesses:

There is no clear framework for how the Head Administrator and Secondary Principal will conduct their decision-making.

Sub

Reader's Score: 4

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 provides an adequate plan to administer and supervise grant finances. Financial management includes clear oversight and a fiscal checks and balances process for their current practices. (See page e43)

Weaknesses:

Little detail is provided about specifics for management oversight.

Reader's Score: 4

Continuation - Quality of the Continuation Plan

1. (3) Quality of the Continuation Plan (up to 10 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:

Applicant appropriately would utilize the grant to cover upfront and one-time costs for all expenditures except for two new teachers' salaries during the third through fifth years of the grant. (See page e44)

Applicant also appropriately will utilize the grant to cover certain stipends and fringe benefits associated with grant implementation that will not require continuations. (See page e44).

Applicant provides clear rationale for additional ongoing costs to be absorbed over at the conclusion of the grant through existing revenue streams. (See page e44).

Applicant has a successful and demonstrated track record of implementing their previous 2018 grant. (See page e45)

Weaknesses:

No weaknesses found.

Reader's Score: 10

Selection Criteria - Quality of Project Design

1. (4) 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: 9

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:

Applicant provides a convincing and clear rationale regarding the quality of their project design – this rationale includes exceeding the state and local district in academic performance across math, language arts, and science, providing all students, especially underserved students, with a high-quality education, and providing high-quality teaching instruction. (See page e46-47)

Weaknesses:

No weaknesses found.

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:

Applicant provides an adequate overview of their proposed goals, objectives, and outcomes along with clearly defined milestones they will achieve year over year to demonstrate success in a measurable way. (See pages e49-50).

Weaknesses:

Applicant's limited underrepresented student population is not fully explained and it is unclear how they will address recruiting more underrepresented students.

Reader's Score: 4

Selection Criteria - Need for Project

1. (5) Need for Project (up to 25 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: 19

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:

Applicant details how grant will allow students (200 and counting) to get off their waitlists. (See page e50)

Applicant's data demonstrates students are excelling beyond their district peers. (See page e50)

Applicant explains that the grant will allow them to further improve their school building and school plans. (See page e50)

Applicant provides convincing evidence that they have successfully implemented a previous grant and have a demonstrated track record for further success. (See page e50).

Applicant demonstrates that they will provide more students within their community access for dual enrollment and college credits. (See page e50)

Applicant provides an alternative model for students to progress beyond 6th grade. (See page e50)

Weaknesses:

Applicant provides minimal detail, evidence, or information on the magnitude or severity of the problem they are trying to address.

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 10 points). (34 CFR 75.210(a)(2)(ii))

Strengths:

Applicant provides clear rationale that their school provides offerings that would be unavailable and unaffordable to the community without their school, such as dance, orchestra, sports, and academics. (See page e51)

Applicant details that they will be the first charter high school in Idaho to offer opportunities in performing arts and athletics via the Idaho Activity Association. (See page e51)

Applicant will offer both a mastery and project learning curriculum, which is not found in other local schools. (See page e51)

Applicant will provide an entrepreneurship and career tech program that is unique for their community. (See page e51).

Weaknesses:

Applicant provides minimal evidence of the magnitude of the need beyond that of students being rural. (See pages e51-53)

Reader's Score: 7

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:

Applicant names that they provide curricular materials that support their diverse student body accompanied by professional development for teachers to implement curriculum. (See page e14)

Applicant describes how teachers and staff can voice feedback via surveys and weekly meetings. (See page e15)

Applicant cites specific ways their plan was directly influenced by community engagement: their PE program, string orchestra program, a strong dress code, and having service activities rather than holiday parties were all community driven. (See page e16)

Applicant outlines extensive networking, internship, and job opportunity offerings for students in upper grade levels. (See page e16).

Applicant outlines a partnership in the community to create an innovative dual enrollment program and mentorship program for students. (See page e17).

Applicant demonstrates and details within a table the activities they will be hosting, the frequency of these activities, their purpose, and what stakeholders will be involved. (See pages e17-18)

Weaknesses:

Applicant does not provide evidence that their described support specifically assists underserved students. (See pages e14-15)

Applicant's school population is not particularly diverse (found later in the application). (See page e19)

Applicant names that they still do not serve a population that is comparable to the school district regarding underserved students. (See page e20)

Applicant did not clearly explain the surveys they reference and how teacher weekly meetings will be conducted. (See page e15)

Applicant does not provide clear date ranges, start dates, or types of professional development that will be offered. (See pages e17-18)

As providing special education is required under federal law, the applicant does not sufficiently explain how it is a milestone. (See page e-18)

Reader's Score: 3

Status: Submitted

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Technical Review Coversheet

Applicant: American Heritage Charter School (S282E230007)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	14
Sub Total	20	14
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	35	29
Sub Total	35	29
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	10	10
Sub Total	10	10
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	8
Need for Project		
1. Need for Project	25	19
Sub Total	35	27
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	83

Technical Review Form

Panel #1 - CSP Developers Replication Panel - 1: 84.282E

Reader #2: *****

Applicant: American Heritage Charter School (S282E230007)

Questions

Quality of the Eligible Applicant - Quality of the Eligible Applicant

1. (1) Quality of the Eligible Applicant (up to 20 points).

In determining the quality of the eligible applicant, the Secretary considers the following factors:

Reader's Score: 14

Sub

1. (i) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates and where applicable and available, student academic growth, high school graduation rates, postsecondary enrollment and persistence rates, including in college or career training programs, employment rates, earnings and other academic outcomes) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students served by other public schools in the State (up to 5 points). (2019 NFP)

Strengths:

- Students with disabilities outperformed the district and state averages for those subgroups significantly in reading (e23).
- Economically disadvantaged students achieved ELA proficiency at higher rates (at least ten percentage points higher) than both the state and district average (e25) in the two most recent years of data.
- Economically disadvantaged students achieved math proficiency at higher rates (at least 10 percent points higher) than both the state and district averages in the five most recent years of data (e27).
- Economically disadvantaged students achieved science proficiency at much higher rates (more than 20 percentage points higher) than both the state and district in the most recent year for which there is data (e29).

Weaknesses:

- The school currently serves a smaller percentage of economically disadvantaged students, students with special needs, and non-white students than the local district (e19-20), and so the school's overall performance is higher than the comparison district, they are not serving the same severity of need (e20), and the school does not have a statistically reportable number of students in subgroups (any group except economically disadvantaged and students with disability) to provide this data for more than 2 years (e22).
- Economically disadvantaged students achieved reading proficiency at lower rates than both the state and district average for the same student group in the most recent year for which data was provided (e23).

Sub

Reader's Score: 3

2. (ii) The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation (up to 5 points). (2019 NFP)

Strengths:

The school is in good standing with their authorizer and was recently renewed for five more years (e30).

Weaknesses:

The applicant does not indicate whether or not any charter schools managed by the applicant have closed or have been revoked.

Reader's Score: 3

3. (iii) The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter (up to 5 points). (2019 NFP)

Strengths:

- Applicant has not had any significant financial or operational management or student safety issues (e30), and the authorizer evaluated the school as receiving "exceeds standards" in all nine financial areas in the most recent fiscal year (e30).
- The school achieved "met the standard or exceeds standards" ratings for six of seven operational measures on the performance framework (e30).
- School has annual audits with "clean findings" (e31).

Weaknesses:

- The school received "approaching standard on one of the seven operational measures, although they later resolved it (e30-31).

Reader's Score: 4

4. (iv) The extent to which the schools operated or managed by the applicant demonstrate strong results on measurable outcomes in non-academic areas such as, but not limited to, parent satisfaction, school climate, student mental health, civic engagement, and crime prevention and reduction (up to 5 points). (2019 NFP)

Strengths:

- Parent survey indicates that 81% of parents felt that the school provided a safe, caring, and supportive environment (e31). Staff survey had strong results as well, with 83% of staff feeling they were provided with appropriate resources, support, and a positive school culture (e32).

Weaknesses:

- Only two specific metrics (one response from both a staff and parent survey) (e31) were provided to illustrate non-academic performance, and so it is unclear from the available information if the school has any other non-academic achievements that may be highlighted in this section (e31).

Sub

Reader's Score: 4

Selection Criteria - Quality of the Management Plan

1. (2) Quality of the Charter School's Management Plan (up to 35 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: 29

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 5 points). (34 CFR 75.210(g)(2)(i))

Strengths:

- Budget narrative has two clear objectives: increasing the student population and academically and socially thriving students (e241), and the five-year timeline has clearly specified tasks, milestones, assigned personnel, and dates (e241).

Weaknesses:

- Applicant provides lists of tasks that will be repeated every year of the project, but does not differentiate different tasks for different years, which assumes that every task will be identical for all five years of the project (e34-38). It is clear that some of the tasks will not need to be repeated in all years, for example, "assign personnel to be Athletic Director" (e36) will not be done each year.
- The person responsible for many of the tasks is "admin team", "Staff" and "Community-Outreach Personnel" which are not further defined by any specific role or individual (e34-38).

Reader's Score: 3

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 seem reasonable in relation to the objectives, design, and potential significance of the proposed project (e241), as the school has conducted expansions before and has an idea of the costs (e39). For example, the applicant details all additional personnel required for each additional year of the grant as the school phases in and increases the number of students served (e241).

Weaknesses:

None 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

Sub

objectives of the proposed project (up to 5 points). (34 CFR 75.210(g)(2)(iv))

Strengths:

- Applicant identifies two specific staff – the Project Director and Grant Administrator, one of which will spend [REDACTED] of her time on project activities, and the other of whom will spend [REDACTED] of his time on project activities (e39 and e241).

Weaknesses:

- The time of the only two staff members identified ([REDACTED] of one, [REDACTED] of the other) may be insufficient or inadequate to provide all of the services for the entire project (e39 and e241).

Reader's Score: 3

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:

- Key project personnel have extensive experience including experience in school administration, charter management, special education compliance, community engagement, strategic planning and school improvement, charter school governance, and charter school law, (e40-42).

Weaknesses:

None identified.

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:

- Applicant and key staff have successfully managed large federal grants previously (e43).
- Applicant has a specific plan and controls and checks in place for grant fund expenditures to ensure the applicant maintains control (e43).

Weaknesses:

None 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:

- Applicant indicates that the Head Administrator and secondary principal will make all programmatic decisions, including staffing and day to day operations, as they are the combined school leaders and will ensure that all decisions are aligned with the school's mission and vision (e43-44).

Weaknesses:

- Applicant does not address decisions that will likely need to be made by many of the other key project personnel, nor a decision-making framework (e43-44).

Sub

Reader's Score: 4

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:

- Applicant provides adequate information to indicate that the program manager, who is administering the grant with the board's approval, is being assisted by the grant administrator (e40-42). All expenditures have checks and balances between the grant administrator and the business manager (e40-42).

Weaknesses:

- Applicant focuses on fiscal oversight and provides limited information about programmatic oversight over the grant project, in the section referenced (e40-44).

Reader's Score: 4

Continuation - Quality of the Continuation Plan

1. (3) Quality of the Continuation Plan (up to 10 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:

- Applicant plans to use most grant funding for upfront and one-time costs, such that in future years the school will be able to maintain core programs without the grant in future years (e44-45).
- The school has calculated that they are able to sustain in future years by the per pupil funding generated by the enrollment expansion (e45).
- The school has a history of being financially sustainable with strong financial oversight practices (e45-46).

Weaknesses:

None identified.

Reader's Score: 10

Selection Criteria - Quality of Project Design

1. (4) 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:

- Applicant focuses on fiscal oversight and provides limited information about programmatic oversight over the grant project, in the section referenced (e40-44).

Weaknesses:

None 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:

- Applicant provides two main objectives, including enrollment expansion and maintaining a positive school culture, and lists specific and appropriate activities by which to achieve the objectives in each year of the grant (e47-49).

Weaknesses:

- The goal of increasing the underrepresented student population is mentioned, but not measured or quantified, and they do not define which student groups are included in this (e47-48).
- Many of the goals and objectives are to continue to maintain the same programs/partnerships as currently exist, which does not speak to the scope of the proposed project (e47-49).

Reader's Score: 3

Selection Criteria - Need for Project

- 1. (5) Need for Project (up to 25 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: 19

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:

- Candidate provides some evidence of the severity of the demand for increased seats by stating that they currently have a K-6 waitlist with 200 students (e50).

Sub

Weaknesses:

- Beyond waitlist data, applicant provides minimal information on the severity or magnitude of the need or demand for the expansion (e50).

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 10 points). (34 CFR 75.210(a)(2)(ii))

Strengths:

- Applicant provides adequate information about the need of rural students for the extracurricular programs that the school offers, as there are currently insufficient opportunities for sports, music, and arts in the grades targeted for expansion in the area's existing schools; the school would be the first charter school in the state to offer both sports and performing arts (e51-53).

Weaknesses:

- Beyond stating that there are no other charter schools with identical extracurricular programming, the applicant justifies the need as existing merely by the merit of the students being rural (e51).

Reader's Score: 7

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 applicant provides some information about how teachers contribute general input, and not project specific input, to the school, via weekly meetings and surveys (e15).
- The applicant provides information about past community engagement when the school was first opening (e15) and lists several changes the school has made as a result of "public feedback" (e15-16).
- The applicant provides general information about the school's engagement with the community (including community service projects, networking with local businesses, and dual enrollment), although these examples are not related to the proposed project (e15-17).

Weaknesses:

- The applicant describes how they engage teachers in a teaching mentoring program, but this does not provide evidence for teacher engagement regarding the proposed expansion (e14).
- The applicant provides some examples of their existing community engagement, but none of the examples (student community service projects, collaborations with local businesses, dual enrollment) pertain to the proposed project (e15-17).
- The plan and timeline describes general planning for a small number of community/parent engagement events and is not project-specific (e17-18).

Reader's Score: **3**

Status: Submitted
Last Updated: 08/02/2023 05:37 PM

Status: Submitted

Last Updated: 08/02/2023 05:13 PM

Technical Review Coversheet

Applicant: American Heritage Charter School (S282E230007)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	14
Sub Total	20	14
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	35	31
Sub Total	35	31
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	10	10
Sub Total	10	10
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	9
Need for Project		
1. Need for Project	25	19
Sub Total	35	28
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	86

Technical Review Form

Panel #1 - CSP Developers Replication Panel - 1: 84.282E

Reader #3: *****

Applicant: American Heritage Charter School (S282E230007)

Questions

Quality of the Eligible Applicant - Quality of the Eligible Applicant

1. (1) Quality of the Eligible Applicant (up to 20 points).

In determining the quality of the eligible applicant, the Secretary considers the following factors:

Reader's Score: 14

Sub

1. (i) The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates and where applicable and available, student academic growth, high school graduation rates, postsecondary enrollment and persistence rates, including in college or career training programs, employment rates, earnings and other academic outcomes) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students served by other public schools in the State (up to 5 points). (2019 NFP)

Strengths:

Sufficient data is provided on AHCS students in reading and ELA. For example, the application provides adequate evidence of annual AHCS student academic achievement performance by subgroup between 2013 and 2022 in Figure 1 (p e20) indicating an increase of students identified as economically disadvantaged. In Figure 2 (p e21) a comparison of AHCS and district students labeled as underserved is provided. Comparison data for AHCS, Idaho Falls district schools, and the state on the Idaho Reading Indicator Test (IRI) is provided in Figure 3 (p e22). For example, AHCS students outperform peers in reading. Figure 4 highlights AHCS, the district and state performance on the Idaho State Achievement test in ELA. (p e23). Figure 5 (p e24) provides trend data for AHCS, the district, and state in ELA, illustrating more AHCS students score proficient in ELA than comparison peers. Math scores were also provided in Figure 7 (p e26), Figure 8, (p e27) and Figure 9 (p e28) revealing AHCS students outperformed peers at the district and state levels in math from 2016-2021. Graduation rates were also included in Figure 11 (p e30) by 2018, 2019, 2020, and 2021 cohorts with AHCS students graduating at a higher rate than comparison peers. This is partially appropriate.

Weaknesses:

No comparison data for attendance or retention is provided in the years AHCS has been in existence. While the pandemic is cited in the application as a reason why data is not available (p e30), comparison data for attendance and retention for year before and after the pandemic is needed to provide a complete picture of these factors and to assess how AHCS students compare to peers. This degree of specificity is warranted. Reading scores of economically disadvantaged students are reported as lower than state averages (p e21). The discussion around not serving students with needs is lacking appropriate evidence (pp e22-30).

Sub

Reader's Score: 3

2. (ii) The extent to which one or more charter schools operated or managed by the applicant have closed; have had a charter revoked due to noncompliance with statutory or regulatory requirements; or have had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation (up to 5 points). (2019 NFP)

Strengths:

The AHCS is single charter school (p e30). The application clearly states that AHCS is in good standing with the Idaho Public Charter School Commission, the school's authorizer (p e30). This is somewhat sufficient.

Weaknesses:

The application does not address if AHCS has had a charter revoked due to noncompliance with statutory or regulatory requirements since its inception in 2012. Stating the school is in good standing currently does not address the criteria sufficiently (p e30).

Reader's Score: 3

3. (iii) The extent to which one or more charter schools operated or managed by the applicant have had any significant issues in the area of financial or operational management or student safety, or have otherwise experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter (up to 5 points). (2019 NFP)

Strengths:

The application provides that the AHCS is a single charter school seeking to expand. It is not apparently part of a CMO or an EMO. No audit issues or student safety issues situations have occurred (p e30). The application further states that AHCS has either met or exceeded standards in 6 of 7 operational measures (p e30). An external auditor has provided service to AHCS and clean audits were reported in the application (p e31).

Weaknesses:

The application noted that AHCS was approaching the standard in the 7th operational measure (p e31). This appears to be a regulatory compliance issue (p e30). The application states the issue was addressed.

Reader's Score: 4

4. (iv) The extent to which the schools operated or managed by the applicant demonstrate strong results on measurable outcomes in non-academic areas such as, but not limited to, parent satisfaction, school climate, student mental health, civic engagement, and crime prevention and reduction (up to 5 points). (2019 NFP)

Strengths:

Non-academic instructional practices were partially addressed as part of the proposed plan for expansion, which includes for example, a state survey addressing parental satisfaction and engagement (p e31). The AHCS parents who participated in 2022 reported 81% satisfaction (p e31). In addition, AHCS developed a staff survey and results indicated 83% who participated acknowledged being resourced adequately, supported, and experiencing a positive school culture (p e32).

Weaknesses:

No discussion of school climate or student mental health was noted in the application. As such, non-academic areas for students were not addressed in detail (pp e31-32).

Sub

Reader's Score: 4

Selection Criteria - Quality of the Management Plan

1. (2) Quality of the Charter School's Management Plan (up to 35 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: 31

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 5 points). (34 CFR 75.210(g)(2)(i))

Strengths:

The application contains two objectives that focus on (objective 1), expanding enrollment and (objective 2) maintaining a positive school culture (pp e34-38). A timeline for October 2023 through September 2028 was provided. In the timeline, tasks/activities, milestones, the actual timeline dates and responsible personnel were provided in partially adequate detail (pp e34-38). For instance, hiring expansion teachers will include milestones of advertising, attending job fairs, screening applicants, interviewing applicants, hiring and onboarding applicants (p e34). In the timeline, date ranges and responsible personnel are provided clearly. The budget adequately addresses these personnel salaries as 1 teacher in years 1 and 2, and 2 teachers in year 3 (pp e241-261). Adequacy of the management plan is addressed somewhat sufficiently.

Weaknesses:

Both the administrative team and the outreach committee (pp e34-38) personnel were not adequately identified in terms of who would be responsible for what tasks or activities. Specific responsible personnel are not clearly identified as part of the proposed plan (pp e34-38).

Reader's Score: 4

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 are reasonable. For example, expanding grades 7-12 generates both expenses and additional enrollments. For instance, costs are specific, such as the cost for operational resources, personnel such as an evening English teacher, and grant oversight, such as a project director (PD), and grant administrator (GA) (p e39; budget narrative attachment). Overall, costs are reasonable regarding objectives and the significance of the proposed expansion project and costs are broken down for each category such as travel and professional development (PD). As an example, it is clear how many individuals will travel for PD and conferences (pp e241-261).

Weaknesses:

No weakness noted.

Sub

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:

Personnel FTE and time commitments are provided as part of the proposed plan. For instance, the PD position is [REDACTED] each year of the grant and the Project Manager (PM) is [REDACTED] (pp e39-40; e241-261). As an example of description and percentage of effort/time, the key position description for Grant Administrator (GA) is [REDACTED] (pp e39-40; e241-261) which is appropriate.

Weaknesses:

The head of the Board is not a staff member so including this individual is not explained in detail (pp e39-40). The percentage of time for the PD at [REDACTED] and PM at [REDACTED] does not adequately address the range of activities and expectations listed in the application for which these individuals are responsible and it is difficult to ascertain adequacy of percentage of effort (pp e39-40).

Reader's Score: 3

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:

Key project personnel are adequately described in terms of their specific jobs as they pertain to the grant as well as experience, expertise, and educational attainment (pp e40-43). In addition, CVs are provided for key team members which further describes specific educational degrees, skill, and expertise (Appendix B). The PM has been employed at AHCS since 2013, has an earned doctorate, a masters in educational leadership, and has skill and expertise in developing, implementing, and managing federal grants (Appendix B). Key project personnel are clearly qualified.

Weaknesses:

No weakness 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:

As a proposed expansion, the PM possess previous federal grant experience and will administer funds with the Board's approval. The application discusses the AHCS's previous replication and expansion grant in 2018 (p e43). The application attests that 3 individuals have to approve expenditures (p e43). The AHCS business manager has grant experience as well and implements standard practice (p e43). This is sufficient control and maintenance.

Weaknesses:

No weakness 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 application provides sufficient discussion that AHCS employs decision-making processes regarding programmatic decisions and authority (p e43). For instance, the Head Administrator and secondary principal are responsible for programmatic decisions. This is acceptable given the scope and purpose of the AHCS proposed secondary grades expansion.

Weaknesses:

The application notes who is responsible for programmatic decisions, however, how those decisions are arrived at and ultimately made is unclear. As an example, it is difficult to ascertain how input is provided for decision-making around programmatic determinations (pp e39-40).

Reader's Score: 4

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:

Management and oversight are addressed sufficiently. For instance, it is clear in the application that the PM will administer the grant with the Board's approval (p e43). The PM will be assisted by the GA, and financial issues will require implemented checks and balances as per the AHCS business manager (p e43). This is an adequate plan in terms of maintaining management and oversight responsibility.

Weaknesses:

No weakness noted.

Reader's Score: 5

Continuation - Quality of the Continuation Plan

1. (3) Quality of the Continuation Plan (up to 10 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 AHCS has a continuation plan that is reasonable. For instance, projected increased enrollments from expansion coupled with successful financial practices will likely allow the school to continue beyond the years of the grant (pp e44-45). As an example, most grant expenditures are one-time related to expansion (pp e44-45) with the exception of expanded teaching personnel. AHCS will assume salaries after the grant expires as well as MAP testing and community theatre costs (p e45). In addition, AHCS plans to aggressively fund raise (p e46). The New Sweden School will be acquired/used by AHCS, with 9 classrooms, a gym, a kitchen, principal's office, and room for expansion on the five-acre site. The building is being remodeled by the VanderSloot Farms for the use of American Heritage Charter School at no cost to the school (p e146). This is an appropriate continuation plan.

Weaknesses:

No weakness noted.

Reader's Score: 10

Selection Criteria - Quality of Project Design

1. (4) 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: 9

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 project design is to expand (p e46) and address the needs of the whole child with high quality teachers (p e46). Balanced Leadership and Marzano are cited which illustrate the efficacy of this model. Table 12 illustrates the effect of this model (p e47). Hirsch's Core knowledge is the curriculum (p e52). A logic model is also provided (Attachment 2). This is an appropriate rationale.

Weaknesses:

No weakness noted.

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 proposed project has two appropriate objectives and activities designed to teach the whole child and provide a high-quality school with highly qualified teachers (p e47). Expansion addresses the objectives by increasing enrollment in grades 7-12 from 128 to 310 students. Teamwork and community are stressed through objective 2 activities (pp e48-49). The application somewhat adequately addresses how outcomes will be achieved (pp e47-49).

Weaknesses:

Underrepresented students are not described (pp e47-49). For instance, no description of what is meant by this population is provided as part of the proposed plan. Thus, it is unclear how objectives for these students will be achieved (pp e47-49).

Reader's Score: 4

Selection Criteria - Need for Project

1. (5) Need for Project (up to 25 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: 19

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 expansion of AHCS is warranted to some degree. For example, the application attests that school choice in terms of alternative educational models and configurations in the target area (p e50) are limited. The application provides that K-6 has a waitlist of 200 students (p e50). The AHCS seeks to serve more students and to diversify the student body. The AHCS has the building space but is in need of outfitting additional classrooms and staffing those expanded classrooms. The severity of need is partially established.

Weaknesses:

Severity of need is not fully discussed in the application. For example, the proposed plan does not detail how a more diverse student body will be achieved. The actual significance of becoming more diverse as a need is not explained in adequate detail (p e50).

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 10 points). (34 CFR 75.210(a)(2)(ii))

Strengths:

Programming that offers the state's first charter high school with athletics and strings is discussed. Likewise, offering educational alternatives that stress leadership as compared to local district programming is established as a need in this Title 1, rural Idaho school. The proposed project will add 182 additional students to AHCS. (p e51). Growth and student achievement are the intended outcomes. As examples of need, both academic rigor and Project-Based Learning are described as attributes not found in local schools (p e52) as well as civic service, community, and leadership (p e53) are not offered in local schools, which partially addresses the magnitude of proposed services.

Weaknesses:

Limited evidence of magnitude is provided in the proposed plan. For instance, data that supports magnitude of need is lacking in the application beyond stating AMCS is a title 1 school and a rural school. More robust data is needed to support the severity of need for services that will be provided through expansion (pp e50-52).

Reader's Score: 7

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 application provides a basic discussion of how teachers are meaningfully engaged on an ongoing basis for the proposed expansion of American Heritage Charter School (AHCS) (p e14). Teachers can attend weekly collaboration meetings and surveys (p e17) are administered once per year to gain input on the school's educational system; teachers can meet with the Board chair (p e15).

2 The application adequately discusses strategies for community engagement. For instance, as the AHCS was being planned, public meetings were held with various stakeholders to solicit input. Examples of such input were provided such as a dress code, including physical education (PE), implementing service activities, and implementing a string orchestra (pp e15-16). Examples of service projects like picking potatoes, working with senior centers, and sending packages to active duty service men and women (p e16) were provided. Job shadowing was also referenced as kind of community-centered approach. As well, job shadowing and business personnel providing guest lectures were described as community assets (p e16). Also, dual enrollment was listed as a community centered approach (p e17). This is a standard community-centered approach.

b A basic timeline is presented with appropriate milestone activities and a timeframe as well as the purpose of the activities and identified stakeholders (pp e17-18). As an example, professional development is ongoing, supports staff and stakeholders were identified as all staff.

Weaknesses:

a 1 The application does not provide a sufficient description of the survey referenced (p e15) such as the content of survey questions. No examples of past surveys are provided. In addition, the nature of weekly meetings is not discussed sufficiently in terms of how teachers, current and past, can provide input about expansion. The description regarding how teachers can address the school's educational system is vague. Thus, it is difficult to assess the degree of meaningful engagement. Discussion of how teachers are meaningfully engaged is not adequate.

2 No weakness noted.

b The timeline did not include needed details about frequency. As an example, PD is listed as an activity, but no dates or date ranges are provided, and the kinds of PD were not specified on the timeline; thus, it is difficult to ascertain if PD is a milestone (pp e17-18). No specific start and end dates with aligned milestones are included in the application. In particular, one identified milestone is providing special education services (p e18); however, that is federal law to do so. Thus, assessing milestones in terms of planning or development of the proposed expansion of AHCS is difficult.

Reader's Score: 3

Status: Submitted
Last Updated: 08/02/2023 05:13 PM