

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

Status: Submitted

Last Updated: 08/01/2023 09:51 AM

Technical Review Coversheet

Applicant: Helix Community Schools (S282E230010)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Sub Total	20	15
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	35	26
Sub Total	35	26
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	10	7
Sub Total	10	7
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	4
Need for Project		
1. Need for Project	25	22
Sub Total	35	26
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	77

Technical Review Form

Panel #2 - CSP Developers Replication Panel - 2: 84.282E

Reader #1: *****

Applicant: Helix Community Schools (S282E230010)

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: 15

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:

The applicant demonstrates above-average performance at the Helix Mentorship Academy compared to local schools with similar populations (pg. e18). The applicant provides attendance data for its middle schools that exceed the average of the region (pg. e22). The applicant details graduation rates for Helix Mentorship Academy for economically disadvantaged, students of color, and students with disabilities at 14% above the local system and 5% higher than the state (pg. e23).

Weaknesses:

The applicant does not provide total population graduation rates for Helix Mentorship Academy for comparison (pg. e23).

Reader's Score: 4

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 applicant reports no charter schools operated or managed by the applicant have closed, been revoked, terminated, or voluntarily dissolved in its 12-year history (pg. e23).

Sub

Weaknesses:

No weakness identified.

Reader's Score: 5

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 applicant thoroughly details it has not had any significant issues in the areas of financial or operational management, student safety, or other problems with statutory or regulatory compliance of any kind that could lead to revocation of a school's charter (pg. e24). Additionally, the applicant has been approved by the Louisiana State Bond Commission for tax-exempt bond financing in 2021 and Helix Mentorship Academy met all financial components of the Fiscal Performance Framework in 2021-22 (pg. e25).

Weaknesses:

In the provided audit, the auditor notes the concern about a \$ [REDACTED] deficit in net assets and recommendations to correct and strengthen their financial position. (pg. e287-288).

Reader's Score: 3

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:

The applicant speaks broadly regarding parent satisfaction through surveys and parent-teacher conferences (pg. e26). The applicant reports comprehensive anti-bullying initiatives and restorative justice practices have led to a reduction in incidents (pg. e26). The applicant also adopted a wraparound services model in 2023, integrating mental health and counseling into the educational framework (pg. e26). The applicant also discusses robust security measures which include cameras, visitor protocols, and local law enforcement partnerships.

Weaknesses:

Although the applicant speaks to the components generally and broadly (including parent satisfaction, school climate, student mental health, civic engagement, and crime prevention; however, there is a lack of measurable data provided and the details are vague (pg. e26).

Reader's Score: 3

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: 26

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 applicant proposes to implement a Director of Corporate Work Study Program (CWSP) to oversee the program with two site visits per year, a principal of CSWP to oversee the daily operations and serve as an instructional leader, a CSWP Manager to work closely with students and corporate partners, and a teacher position to coordinate programming and teach (pg. e28-29). In reference to increasing enrollment under the CSWP, the applicant proposes school development in the following areas: Academics, Workforce Development, Finance, Operations Management, Facilities, and Board Governance (pg. e32-33). The applicant provides a general timeline of tasks with responsible parties (pg. e35-36).

Weaknesses:

While the applicant proposes an implementation of various roles with responsibilities and a Project Timeline At A Glance; however, how these items relate to project milestones is unclear. Additionally, the plan for increasing enrollment through this program is vague and implemented through general school improvement areas (pg. e35-36).

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:

The applicant proposes the majority of costs will go to the salaries of employees to implement the CSWP program over five years (pg. e331). Additionally, three additional teacher salaries to support enrollment growth (pg. e331). A small portion, \$ [REDACTED] is allocated toward student recruitment efforts and marketing of the program (pg. e333).

Weaknesses:

The budget narrative does not clearly align with the project timeline as it requests full salary funding for three teachers for five years to accommodate increased enrollment; however, the project adds an initial enrollment of 100 students in year 1 and an additional 20 in each subsequent year.

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 applicant proposes [REDACTED] time and effort by the Project Director, [REDACTED] time and effort by the Executive Director, [REDACTED] time and effort by the Finance Manager, and [REDACTED] time and effort by the CWSP Principal, Director, Manager, and teacher which seems adequate for the proposed project (pg. e36).

Sub

Weaknesses:

No weaknesses were 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:

The applicant details the relevant education and experience of each key personnel in the project demonstrating competency for achieving the project's objectives (pg. e37-42). The applicant extensively provides details and qualifications for the following positions: President of Helix Community Schools, Executive Director, Corporate Work Student Program (CWSP) Principal, Director of CWSP, Project Manager, Financial Manager, and the Board of Directors (pg. e37-42).

Weaknesses:

No weaknesses were 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:

The applicant mentions a "CPA firm will ensure that all CSP grant funds have been properly appropriated in accordance with grand terms" (pg. e44). The applicant describes a finance committee that will ensure fiscal accountability and transparency (pg. e43).

Weaknesses:

The applicant describes the school's overall financial accounting policies and practices but does not specifically address a plan for maintaining control over all CSP grant funds (pg. e43-44).

Reader's Score: 4

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

Strengths:

The applicant describes the organization's leadership model and departments including their various decision-making functions and areas. The applicant describes the functions of the Executive Team as operational and administrative decisions and the Instructional Team for academic and curricular decisions (pg. e44-45).

Weaknesses:

The applicant does not explicitly demonstrate decision-making authority or plans, but rather discusses who makes decisions for various programmatic areas such as operational, administrative, academic, financial, etc. (pg. e44).

Reader's Score: 3

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)

Sub

Strengths:

The applicant intends to use existing Board of Director systems to assess the grant (pg. e45). The applicant provides the general cadence and practices of evaluation by the Board of Directors including criteria evaluated (pg. e46).

Weaknesses:

The applicant describes existing Board of Director systems and areas of assessment; the applicant does not specify a plan to administer or supervise the grant nor does it include specifics for maintaining management and oversight responsibilities (pg. e45).

Reader's Score: 3

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 applicant demonstrates a thorough financial plan for continuation including enrollment estimates and the percentage of funding anticipated from the state (pg. e48). The applicant also intends to receive sponsorship pay from each corporate and worksite partner (pg. e48). Additionally, the applicant provides a data table showing a surplus of operating expenses through 2028 (pg. e49).

Weaknesses:

The applicant is relying on CSP funds, private contributions, and sponsorship pay to generate a surplus but without these funds, the program would be in a deficit (pg. e49).

Reader's Score: 7

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: 4

Sub

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

Sub

Strengths:

The applicant provides a rationale for the project as expanding enrollment by implementing a Corporate Work Student Program (CWSP) (pg. e10). The applicant provides a logic model with inputs, activities, outputs, and outcomes (pg. e327).

Weaknesses:

The applicant's project rationale focuses heavily on the implementation of the CWSP but lacks a connection to increasing enrollment through this initiative (pg. e10). The provided logic model outlines steps to recruit students with limited detail that does not include targets for achieving increased enrollment (pg. e327).

Reader's Score: 2

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

Strengths:

The applicant describes the intent to use existing performance measures from the Charter School Performance Compact and the metrics used by Louisiana to determine School Performance Scores as well as its mission and foundational goals (pg. e49).

Weaknesses:

The applicant provides a table in the Logic Model of the application to demonstrate how the data on each metric will be collected and the rationale for each metric as a critical predictor of success in achieving their mission; however, the applicant does not provide explicit goals, objectives, and outcomes to be achieved through the project specifically (pg. e50). The Logic Model in Appendix G appears to show the inputs, activities, outputs, and outcomes for the school and is not project specifically (pg. e327).

Reader's Score: 2

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: 22

Sub

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

Strengths:

The applicant provides comprehensive data on the local and surrounding student population's economically disadvantaged status, disability status, and food insecurity (pg. e51). The applicant demonstrates through these combined data a severe need for high-quality programming and specifically the need for successful transitions from adolescence to early adulthood requiring skills and resources to graduate, enter college, or the workforce (pg. e53).

Sub

Weaknesses:

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

Strengths:

The applicant provides data to demonstrate the need in the local community, citing 55% of students in the area are attending schools failing to provide them with appropriate skills. The applicant directly correlates the need to expand their enrollment through seats and implement a Corporate Work Study Program (pg. e53). The applicant also describes auxiliary services offered to students and their potential benefit of attending the school such as school-based mental health services and integrated student supports (pg. e54).

Weaknesses:

Although the applicant demonstrates a general need and proposes a solution through expanded enrollment and the CWSP; the applicant does not demonstrate data to support the needs based on the program such as workforce data (pg. e53-54).

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 a rationale for expansion by 'including meaningful and ongoing engagement with current or former teachers and other educators;' the applicant describes the merits and quality of the existing core leadership team and board of directors including many former educators (pg. e15-16). The applicant provides a community-centered approach, the applicant states their management plan includes an assessment of community assets and implementation practices and they seek out partnerships to provide feedback and support that informs school programming (pg. e16).

Weaknesses:

Although the applicant proposes in the narrative to, 'expand its current enrollment with the meaningful and ongoing engagement of highly qualified individuals, including teachers and educators;' the plan to engage or recruit these individuals is unclear (pg. e15-16). The applicant states their Project Timeline at A Glance includes opportunities for community feedback and engagement; however, there is only one instance of this occurring in Year 1 as part of an ongoing effort to identify local partner organizations for the CWSP program (pg. e34).

Reader's Score: 3

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Technical Review Coversheet

Applicant: Helix Community Schools (S282E230010)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Sub Total	20	15
Selection Criteria		
Quality of the Management Plan		
1. Management Plan	35	27
Sub Total	35	27
Continuation		
Quality of the Continuation Plan		
1. Continuation Plan	10	6
Sub Total	10	6
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	4
Need for Project		
1. Need for Project	25	21
Sub Total	35	25
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	76

Technical Review Form

Panel #2 - CSP Developers Replication Panel - 2: 84.282E

Reader #2: *****

Applicant: Helix Community Schools (S282E230010)

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: 15

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:

The applicant presents strong academic achievement results of its campuses substantially exceeding the average academic achievements for schools on the state performance scores, on subject mastery, attendance and graduation. All metrics are meeting or exceeding district standards for similarly situated schools serving students where a vast majority are economically disadvantaged (e19-e23).

Weaknesses:

The applicant did not provide data related to postsecondary enrollment and persistence, suggesting that this is an area of growth for the applicant.

Reader's Score: 4

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:

Since its inception 12 years ago, the applicant has opened three charter schools and had no school closures or charter revocations for any reason (e23).

Sub

Weaknesses:

No weaknesses identified.

Reader's Score: 5

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 applicant provides evidence that it has met all financial and operational management and compliance benchmarks in its district report card (e25).

Weaknesses:

While the applicant identifies in the narrative that it has no issues in the area of financial management, its audit reflects a net asset loss of more than [REDACTED] (e276). The applicant's supplemental financial statement identifies "going concerns" that to cover current expenses outpacing revenues, the applicant intends to increase enrollment, consolidate leadership positions, and reduce transportation. (e287-288). Thus, it appears that the applicant is relying on many contingencies, including receiving this grant, to successfully operate. This raises a question as to whether, given the future financial challenges, the applicant will be able to effectively execute on this proposal, particularly if one of the contingencies is not achieved. Also, it is unclear how the increase in enrollment will increase its revenue to the point of covering its expenses.

Reader's Score: 3

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:

The applicant has provided an explanation about how its feedback mechanisms with families (e.g., conferences, surveys, etc.) provide opportunities for open dialogue and increase parent satisfaction. (e26). In addition, the applicant provides high-level detail the existence of its anti-bullying and restorative justice practices have led to improving school culture, and how it has adopted wraparound services to integrate mental health supports (e26-27).

Weaknesses:

Although the applicant has named systems and structures in place to support parent satisfaction, school climate, and mental health of students, the descriptions lack specifics to give the reviewer an understanding of what these systems look like in practice, and the applicant does not provide data or descriptive information to underscore the efficacy of their practices.

Reader's Score: 3

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: 27

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 management plan provides appropriate tasks and broad milestones to theoretically achieve the goals of the proposed project. The project plan contemplates recruiting students, building curriculum, partnering with businesses for work placements, and engaging with parents and other stakeholders in developing the program, which serve as the crux of this project (e35).

Weaknesses:

The plan to recruit 100 additional students beginning now (July 2023) through October 2023, before the CWSP has in place any of its corporate partners, staff, or curriculum, seems overly ambitious (e34-35). Milestones in the applicant's management plan are vague, offering large windows in time, and do not account for dependencies on completed tasks. For example, the year 1 plan contemplates simultaneously reviewing curriculum materials and developing a curriculum for business literacy; and review of curriculum materials extends beyond the timeline of completing a curriculum. (e35). In addition, while role titles are distinct, responsibilities are all shared and not clearly defined among the leaders. For example, most of the project plan timeline tasks call for the "Executive Director, CWSP Principal, and CWSP Management team" to work together to achieve the task, but does not differentiate who is doing what piece of a task or how labors will be divided efficiently (e35).

Reader's Score: 2

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 nearly all associated with the personnel needed to achieve the objectives and design of the project, including the program leadership and the teachers needed to accommodate the additional students (e331-332). Travel costs for necessary professional development are reasonable.

Weaknesses:

The applicant lacks evidence of rationale and reasoning whether the teaching positions should reasonably be paid for by the grant; where is the money received from school funding going for the 100-180 new students enrolled in the proposed program.

Reader's Score: 4

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

Strengths:

The time allocations appear appropriate and adequate to meet the objectives. A school leader can reasonably spend [REDACTED] of their time on standing up a new initiative when running the school. The other key project personnel

Sub

will be spending [REDACTED] of their time on the proposed project or on teaching the additionally enrolled students (e331).

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:

The qualifications of the key project personnel are strong and highly relevant to the proposed project. The proposed Director of Corporate Work Study has relevant experience in doing the same at another high school within this community, including staffing, contracting, and budget management (e39). The Principal has experience in curriculum development and implementation (e39), and the proposed financial manager has relevant experience in accounting, audits, and managing finances of educational institutions (e41).

Weaknesses:

No weaknesses 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:

The application provides a sound plan to maintain control over the CSP grant funds through creating a Board-approved finance committee to perform budget review, review monthly statements, and oversee accounting practices, among other key financial controls (e43). In addition, the grant funds are primarily used on personnel, so there is a lower risk of funds being misused.

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:

Both the Executive Team and the Instructional Team are managed by key grant personnel to make all academic, financial, operational, and developmental decisions with respect to the program. The applicant provides a convincing description of the key functions of how they make programmatic decisions (e44-45).

Weaknesses:

Although key personnel are described as being in positions of decision-making power, it is unclear how the independent board of the school may influence any decisions with respect to the grant, and whether in their role as an oversight body, how they might view the resources of the program and how that impacts the Helix schools overall.

Sub

Reader's Score: 3

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 describes a strong system of board oversight, where the charter school board meets regularly, evaluates the management practices of the charter leadership, and consults metrics concerning community leadership, human resource management, financial stability, and other oversight metrics (e45-46).

Weaknesses:

The applicant has adequately described a general board oversight system with a strong board, but that does not necessarily connect to oversight of responsibilities specific to the grant. There is no evidence that the charter board will have read the grant criteria and be able to review progress related to the grant itself (e46).

Reader's Score: 3

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 applicant details how the state's Minimum Foundation Program and revenue from sponsorship fees associated with companies participating in the CWSP program will be the big ticket funding to sustain the program in perpetuity (e48-49). Assuming accuracy of the projections and that the program will achieve its ambitious enrollment goals—a large assumption—this continuation plan is sound and reasonable.

Weaknesses:

The applicant's long-term financial projections contemplate [REDACTED] each year from the CWSP revenue (e49), which means that this is not necessarily sustainable after the grant expires. Relying on such a large revenue stream without more evidence seems unjustified. In addition, since the continuation plan budget does not break down enrollment overall at the school, it is difficult to see what revenues would be new as a result of the CWSP and what revenues are part of the school from prior to the CWSP. Given that the 2022 financials reflect a [REDACTED] deficit, it is unclear if there is inconsistency among the narrative and the supplemental financials.

Reader's Score: 6

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: 4

Sub

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

Strengths:

The rationale identified by the applicant is that this project will serve the goal for all students to be on track to graduate with the skill sets necessary to excel in both college and career pathways, as aligned to the school organizational culture and school mission serving economically disadvantaged students (e49).

Weaknesses:

While the idea is laudable, the proof of a rationale is undermined where applicant states that this expansion "to add a Corporate Work Study Program. . . represents a fresh opportunity to build a new proof point of educational reform" (e53). Unfortunately, the project's logic model is lacking research or evaluation findings that suggest it is likely to improve relevant outcomes.

Reader's Score: 2

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

Strengths:

The applicant identifies specific, measurable, and time-bound goals on its logic model (e327) meant to be achieved by the proposed project.

Weaknesses:

Applicant's logic model (e327) identifies inputs, activities, and outputs related to short term and long term goals, but lacks a connection between the proposed project activities and outputs in the form of interim milestones and baselines they are working toward. Where that connection is lacking, it is not clear that the goals are attainable or reasonable.

Reader's Score: 2

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: 21

Sub

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 proposed project would serve as an additional and dynamic educational program in a high performing, non-selective charter school in Baton Rouge. The applicant has demonstrated with ample data that the students it serves in its program are a vast majority economically disadvantaged and live in food insecure areas, and from families who are subject to the hardships and lack of opportunity common to communities of concentrated poverty. As the stated goal of the program is to provide expanded opportunity and improved educational programming for students, the applicant demonstrates that its proposal is designed to address a problem of significant magnitude (e51-52).

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

Strengths:

As the applicant has established a substantial need for more effective schools across Baton Rouge, and they are intending for an additional 180 quality seats for students, the services to be provided based on the proposed project will have a significant magnitude (e53).

Weaknesses:

It is unclear about whether it is the quality of the program at HMSA or the particulars of the addition of the CWSP that the applicant is stating. It is not clear what is preventing additional students from enrolling to receive the high-quality academic programming and wraparound services of HMSA. The applicant appears to conflate the expansion of the CWSP with the HMSA services in its application (e.g., prioritizing a dedicated special education teacher (e55), connecting families with resources to overcome non-academic challenges affecting postsecondary success (e54).)

Reader's Score: 6

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 intends to build out a much larger work-study program to an already successful charter school. As a successful work-study program necessarily will require working with businesses and organizations that are in the community, this project on its face serves the goal of requiring interaction between community assets and the charter school.

Weaknesses:

The applicant lacks explanation that when a school is built with its community in mind there is necessarily an assessment of community assets (e16), but appears to miss the opportunity to expressly asset map as a key activity and milestone in the development of work-study programming. The applicant also lacks clear and specific milestones for the planning, development, and implementation of the work-study program, opting instead for broad windows and key outcomes without specific milestones to track progress.

Reader's Score: 3

Status: Submitted
Last Updated: 08/01/2023 09:50 AM

Status: Submitted

Last Updated: 08/01/2023 11:26 AM

Technical Review Coversheet

Applicant: Helix Community Schools (S282E230010)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Quality of the Eligible Applicant		
Quality of the Eligible Applicant		
1. Eligible Applicant	20	15
Sub Total	20	15
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	7
Sub Total	10	7
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	10	5
Need for Project		
1. Need for Project	25	23
Sub Total	35	28
Priority Questions		
CPP		
Competitive Preference Priority		
1. CPP	5	3
Sub Total	5	3
Total	105	81

Technical Review Form

Panel #2 - CSP Developers Replication Panel - 2: 84.282E

Reader #3: *****

Applicant: Helix Community Schools (S282E230010)

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: 15

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:

The applicant includes data among schools that serve 80% or more educationally disadvantaged students. The applicant's school has the highest academic outcomes in the city. (e18) The applicants' schools exceed attendance metrics for similar students from the city and in terms of graduation exceed similar schools across the state. (e22).

Weaknesses:

The applicant does not compare academic outcomes statewide but rather only focuses on a comparison within the city. (e18)

Reader's Score: 4

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 applicant has never had a school closed, a charter revoked or had their affiliation revoked. (e23)

Sub

Weaknesses:

No weaknesses noted.

Reader's Score: 5

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 applicant clearly demonstrates a solid track record of financial management including being approved for a significant bond from the state. (e24-5) The applicant has received the highest score from the chartering agency in regards to finances. (e24-5)

Weaknesses:

Results from an audit indicate some concerns in financial management that include not fully accounting for all funds. (e287-288)

Reader's Score: 3

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:

The applicant mentions strong parent satisfaction on parent surveys. Specifically, parents are satisfied with positive academic and social outcomes for students, including acceptance to college. (e26-27)

Weaknesses:

The applicant does not provide specific data to illuminate their school's climate, student mental health, civic engagement or crime prevention and reduction. (e26-27)

Reader's Score: 3

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

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 applicant includes a management plan that addresses numerous details of the project. The applicant is planning to add two management positions that will serve to execute the objectives. (e28). The applicant provides a high level overview of the responsibilities of specific personnel in implementing the objectives. (e29-31)

Weaknesses:

The applicant is unclear about how the expansion relates to the program and some of the milestones are vague.

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:

The applicant demonstrates that the hiring of additional personnel and associated program costs will comfortably be sustained when the additional 100 students are added to the school. The budget demonstrates that with the full additional enrollment that the costs will be manageable. (e36)

Weaknesses:

The applicant's budget narrative does not clearly align to the timeline in relation to when students are added to the school and when funds become available.

Reader's Score: 4

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

Strengths:

The time commitments of key personnel are more than adequate and include substantial portions of their time each week, at times exceeding 50%, to meet the objectives and encompass a significant portion of multiple executive level employees. (e36)

Weaknesses:

No weaknesses noted.

Reader's Score: 5

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

Strengths:

The applicant demonstrates key personnel having a multitude of experience operating at a similar scale and showing deep expertise in the areas of the project. They have opened schools and implemented large scale projects of similar financial impact. (e38-40)

Sub

Weaknesses:

No weaknesses noted.

Reader's Score: 5

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

Strengths:

The applicant describes a detailed process to maintain control over the funds that includes multiple layers of oversight. These include ongoing assessment by multiple stakeholder groups as part of a structured review process. (e43)

Weaknesses:

No weaknesses noted.

Reader's Score: 5

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

Strengths:

The applicant details the organizational structure is focused on getting input from stakeholders on crucial decisions by surveys and various community conversations. (e44)

Weaknesses:

The applicant describes a decision making process that is unclear and overly broad leaving it unknown who has the authority to make the final decisions.

Reader's Score: 3

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 has adequate systems in place to monitor administration and supervision of the grant. These systems provide ongoing assessment throughout the year by various senior leaders including the board and outside auditors. (e45-46)

Weaknesses:

While the applicant provides a generally strong board oversight system, the applicant does not provide enough specifics on how the grant will be administered and what that process will look like.

Reader's Score: 3

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 applicant's financial analysis includes running an operating surplus over the next five years. The applicant demonstrates a conservative approach to budgeting and a prudent eye towards future spending. (e48)

Weaknesses:

The vast majority of the funds contributing to the surplus are variable.

Reader's Score: 7

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: 5

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 applicant includes a basic rationale. (e50) The applicant provides a logic model that includes a rationale and some evidence to support it. Some of the components track clearly.

Weaknesses:

The applicant's logic model is mostly unclear, confusing and vague. The linkages do not always track with each other and do not always line up. It also lacks research and evaluation findings, making it difficult to draw conclusions.

Reader's Score: 2

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

Strengths:

The applicant's goals and objectives are clearly specified. The goals and objectives show a solid connection to each other. (e61)

Weaknesses:

The applicant includes a number of goals that are difficult to measure as they are largely subjective and not likely to be applicable to any type of data collection.

Sub

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: 23

Sub

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

Strengths:

The applicant provides details of intending to serve students of the highest need in the state. The applicant provides data on the economic and environmental needs of the student population and surrounding community. Students will directly benefit from the economic opportunities that this project will provide them and their families, including enhanced exposure to work environments. (e53)

Weaknesses:

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

Strengths:

The applicant demonstrates that these services will have a significant impact on their students. The opportunity to engage in meaningful work will provide numerous benefits to the students going forward including strong connections to future employers and mentors. (e54)

Weaknesses:

The applicant does not clearly demonstrate the connection between the work study program and the overall academic program.

Reader's Score: 8

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 is expanding the flagship school to include an additional career focused program. Current staff with decades of experience will oversee and implement the program by supporting the day to day operations in both administrative and action oriented roles. (e15-16) The applicant includes a project at a glance timeline. (e17) The applicant conducts a high level analysis of community needs. (e16)

Weaknesses:

The applicant does not indicate how they will engage with the community in meaningful ways and does not demonstrate a thorough assessment of community needs.

Reader's Score: 3

Status: Submitted
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