

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

Status: Submitted

Last Updated: 08/02/2016 06:33 PM

Technical Review Coversheet

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	37
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	10
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	20
Quality of Project Evaluation		
1. Project Evaluation	10	10
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	0
Promoting Diversity		
1. CPP 2	3	3
Total	108	90

Technical Review Form

Panel #4 - Charter Management Organization - 4: 84.282M

Reader #1: *****

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 37

Sub Question

1. The degree, including the consistency over the past three years, to which the applicant has demonstrated success in significantly increasing student academic achievement and attainment for all students, including, as applicable, educationally disadvantaged students served by the charter schools operated or managed by the applicant (20 points).

Strengths:

Overall, the data provided by the applicant sufficiently demonstrates that there has been an upward trend in student achievement levels. pg. 11

Weaknesses:

There are some spaces, specifically in the 2015 data that shows a slight 'dip' in scores. Additionally as a result of the absence of data in 2014, it is challenging to determine a true upwards trend.

Reader's Score: 15

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been significant achievement gaps between any of the subgroups of students described in section 1111 (b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant and to which significant gains in student academic achievement have been made with all populations of students served by the charter schools operated or managed by the applicant (15 points).

Strengths:

The applicant was in the top 10 in closing the achievement gap and performance is strong with the exception of EQ2 . Pg. 15. For example in the 2015 – 2016 school year 87% of EQ3's scholars exceeded or met their reading growth goals and 91% exceeded/ met their Math goals.

Sub Question

Weaknesses:

Additionally as a result of the absence of data in 2014, it is challenging to determine a true upwards trend.

Reader's Score: 10

- 3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).**

Strengths:

In some instances the schools outperform the state consistently, however, sub group performance is lagging relative to statewide performance. For example on page 14. EQ2 free and reduced lunch students, special education students and english language learners were outperformed by the state.

Weaknesses:

Additionally as a result of the absence of data in 2014, it is challenging to determine a true upwards trend.
Application Technical Review Form

Reader's Score: 12

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.**

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

There is a clear replication model in place to support educationally disadvantaged students including core values such as "teaching to mastery" "Accountability" "Cultivating new school leaders", clear assessments, etc. (pg. 33) The school additionally has demonstrated success working with a disadvantaged population and is recognized on a state level for high performance and preparing students to be college and career ready.

Weaknesses:

No weaknesses were found.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

1. **The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.**

Strengths:

The project design complete with clear priorities, goals and actions is clearly, specified, measurable and attainable. Activities are reflective of the prior success in place in the network founding schools and cover basic services, standards implementation, parent involvement, pupil achievement, school climate, and access. (Pg. 37) Goals are outlined in their strategic plan.

Weaknesses:

No weaknesses found.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan & Personnel

1. **The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-**

Reader's Score: 20

Sub Question

1. **The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks (4 points).**

Strengths:

The management plan is clear and the objectives are both necessary and achievable. Activities range from human capital responsibilities to operations and the instructional program and are allocated to specific parties. (Pg. 43)

Weaknesses:

No weaknesses found.

Reader's Score: 4

2. **The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Sub Question

Strengths:

There is a clear plan identified for improving, sustaining, and ensuring the quality and performance of charter schools in the area of facilities, financial management, student academic achievement, governance, oversight, and human resources. The applicant further details the role of the network office – warranting that it will continue to oversee all financial functions of the school and participate in external reviews from governing bodies. (Pg.49)

Weaknesses:

No weaknesses found.

Reader's Score: 4

- 3. A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders critical to the project's long-term success (4 points).**

Strengths:

The applicant provides a multi year narrative and budget as well as notes funding confirmation from the Ahmanson foundation, Weingart Foundation, Charter School Growth fund and others. The process for managing funds and cash reserves is additionally detailed in the application.

Weaknesses:

No weaknesses found.

Reader's Score: 4

- 4. The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

There is a clear plan and process in place for how the applicant will handle school closure. (Pg. 51)

Weaknesses:

No weaknesses found.

Reader's Score: 2

- 5. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project (6 points).**

Strengths:

The applicant has adequate project personnel who are extensively qualified to lead the school into the expansion. Key leaders include a Strategic Growth Director, a COO, a Human Capital Director, a CEO, a Curriculum Director and others. P. 55

Weaknesses:

no weaknesses found.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.

Strengths:

The applicant is partnering with the RAND Corporation to conduct independent evaluations of the replication efforts under this grant. The applicant additionally stated that it participates in authorizer and other external reviews due to its award status. Research questions (Pg.56) to be answered by these evaluative methods include: "What features of the Equitas model and what lessons can be drawn to inform future replications or to inform best practices in charter school expansion. What features present special challenges and opportunities for the development of high schools? To what extent is the Equitas replication implemented with fidelity to the intended model at each new school?" Etc.

Weaknesses:

No weaknesses found.

Reader's Score: 10

Priority Questions

Competitive Preference Priority - Supporting High-Need Students

1. This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education's (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones. The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

No strengths found.

Weaknesses:

The priority was not addressed.

Reader's Score: 0

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --
 - (a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;
 - (b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and
 - (c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

The applicant demonstrates through its data that it serves students with disabilities at a rate that is comparable with the district and additionally employs many strategies to ensure that the school diversity is representative of the community. Furthermore the school has a very high English language learner population (pg. 7) and exceeds the average of ELL enrollment in the district.

Weaknesses:

No weaknesses found.

Reader's Score: 3

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Technical Review Coversheet

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	40
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	10
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	20
Quality of Project Evaluation		
1. Project Evaluation	10	10
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	0
Promoting Diversity		
1. CPP 2	3	0
Total	108	90

Technical Review Form

Panel #4 - Charter Management Organization - 4: 84.282M

Reader #2: *****

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 40

Sub Question

1. The degree, including the consistency over the past three years, to which the applicant has demonstrated success in significantly increasing student academic achievement and attainment for all students, including, as applicable, educationally disadvantaged students served by the charter schools operated or managed by the applicant (20 points).

Strengths:

The schools have clearly demonstrated they generate strong academic success for their students as evidenced by their 3 year achievement scores. (p. e27)

Weaknesses:

2015 data showed their schools fell behind the state wide average for all groups. Additionally, they did not provide all three years of data. (p. e27-28)

Reader's Score: 15

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been significant achievement gaps between any of the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant and to which significant gains in student academic achievement have been made with all populations of students served by the charter schools operated or managed by the applicant (15 points).

Strengths:

The school is one of the top ten in the state of CA in terms of closing or eliminating the achievement gap for low income students. (p. e32)

Weaknesses:

0% of students with disabilities are meeting the benchmark. (p. e32-3)

Sub Question

Reader's Score: 12

3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).

Strengths:

The school is outperforming the state in academics and attendance. Though no comparison is made the retention rate is high, most recently at or above 90%. (p. e35-7)

Weaknesses:

No comparison is made in terms of retention rate. (p. e35)

Reader's Score: 13

Selection Criteria - Assisting Educationally Disadvantaged Students

1. The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

The school has a strong history of helping these students achieve. They offer a variety of programs and programming to ensure the success of these students. These include clear standards and frequent assessment, teaching to mastery and offering a longer school day and school year (p. e35-49).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.

Strengths:

The school has clear goals, objectives, and outcomes and a detailed list of priorities, goals and actions. Each priority is linked to an important element of student success including achievement, engagement, school climate and course access (p. e54-5).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan & Personnel

- 1. The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-**

Reader's Score: 20

Sub Question

- 1. The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks (4 points).**

Strengths:

The management plan provides for clear responsibilities, timelines and milestones. They provide a detailed chart with activities, timelines and responsible parties. For example, they have a clear and attainable timeline of when they will bring each of their school staff members on board (p. e58-61).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 2. The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Strengths:

The organization has carefully considered facilities, financial management, central office, students' academic achievement, governance, oversight and human resources. They clearly demonstrate the appropriate planning and capacity to accomplish all of these functions. For example, they clearly demonstrate that the Charter School Program funds will be used for one time startup costs and that per-pupil funding will maintain the schools after the grant period ends (p. e61-5).

Sub Question

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 3. A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders critical to the project's long-term success (4 points).**

Strengths:

The organization describes a viable financial model and significant partner and community support. They have demonstrated the ability to work with their community partners at their other schools to acquire valuable resources such as playgrounds and SMART boards (p. e65-7).

Weaknesses:

No weaknesses noted.

Reader's Score: 4

- 4. The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

The plan for closure is covered by the CA Ed Code. The CA charter law provides for clear criteria and a complete process for closing schools (p. e67-8)

Weaknesses:

No weaknesses noted.

Reader's Score: 2

- 5. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project (6 points).**

Strengths:

The personnel clearly have the capacity to succeed with this project based on their prior experience and accomplishments. Their prior experience includes opening and managing successful charter schools at a similar scale to the proposed project (p. e68-71)

Weaknesses:

No weaknesses noted.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

- 1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.**

Strengths:

The plan to partner with the RAND corporation will provide for high quality external evaluation. RAND is impartial (having no previous connection to the school) and widely respected for their research (p. e71-3)

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Priority Questions**Competitive Preference Priority - Supporting High-Need Students**

1. This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education's (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones.

The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

No strengths found.

Weaknesses:

The applicant does not describe how they will assist the LEA.

Reader's Score: 0

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --

(a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;

(b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and

(c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

No strengths noted.

Weaknesses:

More than 95% of students are Hispanic/Latino contributing to racial isolation. (p. e23)

Reader's Score: 0

Status: Submitted
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Status: Submitted

Last Updated: 08/03/2016 04:23 PM

Technical Review Coversheet

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Eligible Applicant		
1. Quality of Applicant	50	39
Assisting Educationally Disadvantaged Students		
1. Disadvantaged Students	10	10
Quality of the Project Design		
1. Project Design	10	10
Quality of the Management Plan & Personnel		
1. Management Plan/Personnel	20	18
Quality of Project Evaluation		
1. Project Evaluation	10	9
Priority Questions		
Competitive Preference Priority		
Supporting High-Need Students		
1. CPP 1	5	0
Promoting Diversity		
1. CPP 2	3	3
Total	108	89

Technical Review Form

Panel #4 - Charter Management Organization - 4: 84.282M

Reader #3: *****

Applicant: Equitas Academy Charter School, Inc. (U282M160026)

Questions

Selection Criteria - Quality of the Eligible Applicant

1. In determining the quality of the applicant, the Secretary considers the following factors--

Reader's Score: 39

Sub Question

1. The degree, including the consistency over the past three years, to which the applicant has demonstrated success in significantly increasing student academic achievement and attainment for all students, including, as applicable, educationally disadvantaged students served by the charter schools operated or managed by the applicant (20 points).

Strengths:

2013 data show that, compared to similar schools, Equitas (EQ) schools consistently outperform their peers in API scores (11).

Applicant provides disaggregated 3-year data by subgroup showing that EQ schools outperform like schools for the following subgroups: Free and Reduced Lunch (FRL), English Language Learners (ELL), Hispanic/Latino, and special education (SpEd) (12).

2015 data show that EQ schools outperformed their comparative schools by a wide margin in reading and math, with the exception of SpEd students in math (14).

Weaknesses:

2015 data show that EQ schools feel behind the statewide average in reading for all groups, SpEd students in reading, math for all groups, math for FRL students, math for ELL students, and math for SpEd students (14).

Reader's Score: 15

2. (i) The degree, including the consistency over the past three years, to which the applicant has demonstrated success in closing historic achievement gaps for the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant, or

(ii) The degree, including the consistency over the past three years, to which there have not been significant achievement gaps between any of the subgroups of students described in section 1111(b)(2)(C)(v)(II) of the ESEA at the charter schools operated or managed by the applicant and to which significant gains in student academic achievement have been made with all populations of students served by the charter schools operated or managed by the applicant (15 points).

Sub Question

Strengths:

Proficiency in math and reading for FRL students exceeds that of comparative schools, the district, and the state by a wide margin, with the exception of EQ2 (16).

EQ's Hispanic/Latino performance in 2013 exceeded the performance of white students in the district and state (17).

Weaknesses:

There appears to be a significant internal achievement gap between EQ's SpEd students and the school average in reading and math, and ELL students and the school average in reading and math. In fact, 0% of SpEd students met the standard in math in 2015 (14).

Reader's Score: 11

- 3. The degree, including the consistency over the past three years, to which the applicant has achieved results (including performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college attendance rates, and college persistence rates where applicable and available) for low-income and other educationally disadvantaged students served by the charter schools operated or managed by the applicant that are significantly above the average academic achievement results for such students in the State (15 points).**

Strengths:

Average daily attendance rate at EQ schools is 96-97% (19).

Over the last 3 years, EQ1 and EQ3 have had no exclusionary discipline incidents and are employing a Restorative Justice behavior model(19).

92% of parents volunteered in the 2015-16 school year (20).

Parents satisfaction surveys show a 92% overall satisfaction rate (20).

Applicant describes the educational model and culture in depth, noting how the school holds high standards for all students, develops its staff and holds it accountable, offers a rigorous, standards-aligned program with intentional supports and a character education program, provides clear standards and frequent assessments, and is a mission-driven school community (19-29).

Weaknesses:

No graduation data was mentioned in this section, nor were college attendance and persistence rates.

Reader's Score: 13

Selection Criteria - Assisting Educationally Disadvantaged Students

- 1. The contribution the proposed project will make in assisting educationally disadvantaged students served by the applicant to meet or exceed State academic content standards and State student academic achievement standards, and to graduate college- and career-ready. When responding to this selection criterion, applicants must discuss the proposed locations of schools to be created or substantially expanded and the student populations to be served.**

Note: The Secretary encourages applicants to describe their prior success in improving educational achievement and outcomes for educationally disadvantaged students, including students with disabilities and English learners. In addition, the Secretary encourages applicants to address how they will ensure that all eligible students with disabilities receive a free appropriate public education and how the proposed project will assist educationally disadvantaged students, including students with

disabilities and English learners, in mastering State academic content standards and State student academic achievement standards.

Strengths:

Applicant details the process for instructing, assessing, and monitoring ELL students' progress, including curriculum used (30-31).

Applicant discusses its process for ensuring FAPE for all students in the least restrictive environment, and within the generalized education setting, whenever possible (32).

Applicant discusses its processes for IEP review, assessment, staffing, documentation, discipline, and due process for students with disabilities (33).

Applicant describes its rigorous high school program, including AP courses, dual enrollment with LA City College, enrichment classes, credit recovery, access to a college counselor beginning in 9th grade, and tutoring options (36).

Weaknesses:

No weaknesses found.

Reader's Score: 10

Selection Criteria - Quality of the Project Design

- 1. The Secretary considers the quality of the design of the proposed project. In determining the quality of the design of the proposed project, the Secretary considers the extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified, measurable, and attainable. Applicants proposing to open schools serving substantially different populations than those currently served by the model for which they have demonstrated evidence of success must address the attainability of outcomes given this difference.**

Strengths:

Each EQ has its own Local Control Accountability Plan, which includes goal setting, objectives, actions ties to expenditures, measures of assessing progress, timelines, and specific funding allocations (38).

Applicant provides a table showing 8 main priorities, associated goals, and specific actions (38-39).

Additionally, Applicant has outlined goals in its strategic plan in the areas of: instructional program, enrollment, staff recruitment and retention, fiscal responsibility, governance, and accountability (40).

Weaknesses:

No weaknesses found.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan & Personnel

The Secretary considers the quality of the management plan and personnel to replicate and substantially expand high-quality charter schools (as defined in this notice). In determining the quality of the management plan and personnel for the proposed project, the Secretary considers-

Reader's Score: 18

Sub Question

- 1. The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks (4 points).**

Strengths:

Responsibilities of the CMO and individual schools are identified (41).

Applicant provides a table of activities, timelines, and milestones for implementation of new school programs (43-44).

Weaknesses:

No weaknesses found.

Reader's Score: 4

- 2. The business plan for improving, sustaining, and ensuring the quality and performance of charter schools created or substantially expanded under these grants beyond the initial period of Federal funding in areas including, but not limited to, facilities, financial management, central office, student academic achievement, governance, oversight, and human resources of the charter schools (4 points).**

Strengths:

A partnership with Pacific Charter School Development will help secure and finance facilities (46).

Financial management plans include a minimum reserve, training of staff and board in financial issues, and conservative revenue assumptions (47).

Areas identified in this section are well described (46-49).

Weaknesses:

Applicant discusses the school's data program to address academic achievement (48).

Reader's Score: 3

- 3. A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders critical to the project's long-term success (4 points).**

Strengths:

Applicant identifies partnerships, including major grants received (50).

Applicant describes its cash reserves and process for managing funds and providing fiscal oversight and planning (51).

Sub Question

Weaknesses:

No weaknesses found.

Reader's Score: 4

- 4. The plan for closing charter schools supported, overseen, or managed by the applicant that do not meet high standards of quality (2 points).**

Strengths:

Applicant describes the technical process for a school closure (51).

Weaknesses:

While applicant describes the technical aspects of the closure process, it does not describe what events or circumstances might lead to a school closure (51).

Reader's Score: 1

- 5. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project (6 points).**

Strengths:

The CEO of Equitas is an award-winning charter school leader (52).

Key personnel are described and appear highly qualified to manage a project of this scope and size (52-54).

The COO has been a Director of Operations, overseeing facilities, HR, contracted services and security (53), the Development Director has done grant writing, major giving, strategic outreach, and board and relationship development (54), and other staff have experience in HR, special education, compliance, student information systems, IT, teaching, and after school programs (54-55).

Weaknesses:

No weaknesses found.

Reader's Score: 6

Selection Criteria - Quality of Project Evaluation

- 1. The Secretary considers the quality of the evaluation to be conducted of the proposed project. In determining the quality of the evaluation, the Secretary considers the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project.**

Strengths:

Equitas will partner with the RAND Corporation for an evaluation of the replication project under this grant (55).

The evaluation will be both formative and summative, and applicant defines the central questions to be answered through the evaluation. Applicant includes evaluation methods for each question (55-56).

Weaknesses:

Applicant notes that the organization evaluating the school's replication efforts will use "quasi-experimental methods to estimate impacts on student outcomes", but does not describe what these methods are (55).

Reader's Score: 9

Priority Questions**Competitive Preference Priority - Supporting High-Need Students**

1. This priority is for projects that will serve high-need students through one of the methods described below. An application may receive points for only one of the three parts of Competitive Preference Priority 1, and should specify which part it is addressing. If an applicant addresses more than one part of Competitive Preference Priority 1 and does not specify whether it is addressing part (a), (b), or (c), the application will be awarded priority points only for the part addressed in the application that has the highest maximum potential point value, regardless of the number of priority points the application is awarded for that particular part of Competitive Preference Priority 1.

This priority is for projects that will serve high-need students through element (a), (b) or (c) as described below:

(a) Supporting High Need Students. (0 or 5 points).

Projects that are designed to improve academic outcomes, learning environments, or both, for students who are members of federally recognized Indian tribes.

(b) School Improvement. (0 or 4 points).

To meet this priority, an applicant must demonstrate that its proposed replication or expansion of one or more high-quality charter schools (as defined in this notice) will occur in partnership with, and will be designed to assist, one or more LEAs in implementing academic or structural interventions to serve students attending schools that have been identified for improvement, corrective action, closure, or restructuring under section 1116 of the ESEA, and as described in the notice of final requirements for School Improvement Grants, published in the Federal Register on October 28, 2010 (75 FR 66363).

Note: Applicants in States that are exercising flexibility under the ESEA, as amended by NCLB, in the 2015-16 school year may partner with LEAs to serve students attending priority or focus schools (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at www.ed.gov/esea/flexibility, and the Office of Elementary and Secondary Education's (OESE's) December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>). Applicants in all States should review OESE's January 28, 2016 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transitionsy1617-dcl.pdf>, for information on interventions required in 2016-2017.

(c) Promise Zones. (0 or 1 point).

This priority is for projects that are designed to serve and coordinate with a federally designated Promise Zone.

Note: As a participant in the Administration's Promise Zones Initiative, the Department is cooperating with the Department of Housing and Urban Development (HUD), the Department of Agriculture (USDA), and nine other Federal agencies to support comprehensive revitalization efforts in 20 high-poverty urban, rural, and tribal communities across the country. Each application for Replication and Expansion grant funds that is accompanied by a Certification of Consistency with Promise Zone Goals and Implementation (HUD Form 50153), signed by an authorized representative of the lead organization of a Promise Zone designated by HUD or USDA supporting the application, will meet this priority. To view the list of designated Promise Zones and lead organizations please go to www.hud.gov/promisezones. The certification form is available at https://portal.hud.gov/hudportal/documents/huddoc?id=HUD_Form_50153.pdf.

Strengths:

Applicant addressed competitive preference priority (b). No strengths noted.

Weaknesses:

While the applicant does state that the five nearest elementary school, three nearest middle school, and three nearest high schools have been designated for Program Improvement, applicant does not provide evidence that it will be working in partnership with the local LEA to replace and/or transform those schools (6-7).

Reader's Score: 0

Competitive Preference Priority - Promoting Diversity

1. This priority is for applicants that demonstrate a record of (in the schools they currently operate or manage), as well as an intent to continue (in schools that they will be creating or substantially expanding (as defined in this notice) under this grant), taking active measures to --

- (a) Promote student diversity, including racial and ethnic diversity, or avoid racial isolation;
- (b) Serve students with disabilities at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area; and
- (c) Serve English learners at a rate that is at least comparable to the rate at which these students are served in public schools in the surrounding area.

In support of this priority, applicants must provide enrollment data as well as descriptions of existing policies and activities undertaken or planned to be undertaken.

Note: An applicant addressing Competitive Preference Priority 2 is invited to discuss how the proposed design of its project will encourage approaches by charter schools that help bring together students of different backgrounds, including students from different racial and ethnic backgrounds, to attain the benefits that flow from a diverse student body. The applicant should discuss in its application how it would ensure that those approaches are permissible under current law.

Strengths:

All three schools serve students with special needs at the same rate as the district and state (8).

EQ #1 and #3 serve ELL students at a significantly higher rate than the district and state (8).

The demographics of all three schools are disproportionately Hispanic/Latino as compared to the demographics of the neighborhood (7), which promotes racial diversity.

Weaknesses:

No weaknesses noted.

Reader's Score: 3

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