

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

Status: Submitted

Last Updated: 09/16/2024 04:38 PM

Technical Review Coversheet

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	30	30
Quality of Project Personnel		
1. Project Personnel	10	10
Quality of the Management Plan		
1. Management Plan	10	10
Sub Total	70	70
Priority Questions		
Competitive Preference Priority		
Competitive Preference Priority 1		
1. Promoting Equity	3	0
Competitive Preference Priority 2		
1. Impact of COVID-19	3	3
Sub Total	6	3
Total	76	73

Technical Review Form

Panel #13 - Early Tier 1 - 13: 84.411C

Reader #1: *****

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Questions

Selection Criteria - Significance

1. The Secretary considers the significance of the proposed project. In determining the significance of the proposed project, the Secretary considers the following factor:

Reader's Score: 20

Sub

1. (1) The extent to which the proposed project involves the development or demonstration of promising new strategies that build on, or are alternatives to, existing strategies. (20 points)

Strengths:

The project is based upon the high-impact tutoring model, an evidence-based strategy for accelerating student learning (p. e9). The strategy is characterized by shared components of successful tutoring programs. A comprehensive summary defined the project, which will build upon and test an innovative, promising strategy to improve academic achievement and social emotional outcomes for 1,500 high needs students in 2nd-4th grade (p. e9, pp. e14-e16). High-needs students are defined as attending a school with high concentrations of poverty, students of color, and/or performing significantly below grade level (p. e9, pp. e13-e14).

The applicant will implement and evaluate a tutoring project, Tutor901. Three innovations will be tailored to high-needs students. These include (1) providing professional development to tutors to ensure trust-filled supportive learning environments; (2) recruiting tutors reflective of students; and (3) increasing student access to a variety of text-rich resources (pp. e13-e14).

Tutor901 will reflect key components of high-impact tutoring programs. A well-defined table identified program characteristics, research-based practices, and the applicant's Tutor901 program components (pp. e15-e16). For example, Program Characteristic – dosage; Research-based best practices – provide each student with at least three 30-minute tutoring sessions per week; and Literacy Midsouth (LMS) Tutor901 program – three 45-minute sessions per week (p. e15).

Weaknesses:

No weakness found.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

Reader's Score: 30

Sub

- 1. (1) The extent to which there is a conceptual framework underlying the proposed research or demonstration activities and the quality of that framework. (10 points)**

Strengths:

A thorough and well-defined description supported the high quality of the conceptual framework. The framework combines the documented success of high-impact tutoring with best practices for supporting high-needs students (p. e19-e20).

The high-impact tutoring model is an evidence-based approach to accelerate student learning. The model is defined by shared characteristics of successful tutoring programs. The conceptual framework of the project, Tutor901, incorporates four components (e.g., best practices) to support high-needs students. These components include (1) high-impact trust-filled, supportive tutoring sessions; (2) student-tutor bonding; (3) recruitment, professional development, and retention of tutors reflective of the students served; and (4) focused student support (p. e9, pp. e19-e20).

The quality of the proposed framework was also documented in a highly detailed theory of change (p. e78). The model identified relevant inputs, activities, outputs, and short- and long-term outcomes. Each category was further defined into sub-categories. For example, sub-categories for inputs included, people, materials, data tools, and resources (p. e78). Short- and long-term outcomes were further defined as academic, social emotional learning (SEL), and a diverse teacher pipeline (p. e78).

Weaknesses:

No weakness found.

Reader's Score: 10

- 2. (2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable. (5 points)**

Strengths:

The applicant provided a table that identified clear and measurable goals, objectives, and outcomes of the proposed project (pp. e20-e22). Four goals were supported by objectives to be completed for each goal. For example, Goal one stated – provide 1,500 high-needs students with high-impact tutoring annually to accelerate students' literacy development and increase students' reading confidence (p. e21).

Objectives and outcomes were also identified for each goal. For example, Objective 1:3 states – students increase their confidence in reading, and Outcome – 10% increase in students' reported confidence in reading abilities between baseline and end-of-year surveys (p. e21).

Weaknesses:

No weakness found.

Reader's Score: 5

Sub

3. (3) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs. (15 points)

Strengths:

A concise summary and a detailed table identified the strategies to be implemented to meet the needs of the target population. The target school district is the largest in the state with 55 percent of students recognized as economically disadvantaged. Ninety-three percent of the students identify as Black/African-American, Hispanic, or Native American (p. e14). In addition, less than 24 percent of students since 2017 have demonstrated grade level proficiency on the English Language Arts section of the state standardized assessment (e.g., 2017 – 21 percent; 2021 – 14 percent; 2023 – 24 percent (p. e14, pp. e22-e24).

To meet this need, the project will implement high-impact tutoring as a key strategy to support student literacy development (p. e22). The method has been documented to be effective at accelerating student learning (p. e23). Supportive strategies include (1) establishing trust relationships between high-needs students and tutors and (2) providing high-quality literacy materials (pp. e19-e20, pp. e22-e24).

Weaknesses:

No weakness found.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers the following factor:

Reader's Score: 10

Sub

1. (1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. In addition, the Secretary considers the qualifications, including relevant training and experience, of key project personnel. (10 points)

Strengths:

The applicant documented hiring practices, relevant training, and experience of key project personnel in a concise informative summary. The applicant is committed to equitable hiring practices that are guided by its Equal Employment Opportunity Policy (p. e27). It also has a confirmed record of hiring and retaining employees from underrepresented groups. For example, the applicant is a Black-led nonprofit and 62% of its staff identify as people of color (pp. e24-e25).

Qualifications of key project personnel included organizational leadership, program and budget management, data collection and analysis, research and evaluation design, and classroom instruction (pp. e25-e27). Pertinent experience and expertise were also documented in résumés of key project personnel (pp. e49-e72). For example, the résumé of the project director included leadership of a literacy support organization and establishment and maintenance of strategic collaborative community relationships (pp. e49-e50). These relevant skills will facilitate successful accomplishment of project outcomes.

Sub

Weaknesses:

No weakness found.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan

- 1. The Secretary considers the quality of the management plan for the proposed project. In determining the adequacy of resources and quality of the management plan for the proposed project, the Secretary considers the following factors:**

Reader's Score: 10

Sub

- 1. (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.**

Strengths:

A detailed management plan documented the ability of the applicant to accomplish Tutor901 project tasks. The plan identified the roles and responsibilities of key personnel and 13 well-defined milestones with accompanying project leads. Key personnel were also assigned to each milestone (pp. e28-e30). For example, milestone five – recruit and train 150 new and returning tutors identified the applicant and tutor support managers as the project leads (p. e29). The timelines are aligned with the daily operations of the applicant. For example, milestone five will be initiated in the third quarter of each project year (e.g., 2025 – quarter three, 2026 – quarter three).

Letters of support were also included from philanthropic and community-based organizations, government officials, the Memphis business community, and schools to support the proposed project (pp. e73-e77). The support included letters from the Tennessee Department of Education and the U.S. House of Representatives Congressman from Tennessee (pp. e73-e74).

Weaknesses:

No weakness found.

Reader's Score: 10

Priority Questions

Competitive Preference Priority - Competitive Preference Priority 1

- 1. Competitive Preference Priority 1:**

Promoting Equity in Student Access to Educational Resources and Opportunities: Implementers and Partners (up to 3 points)

Under this priority, an applicant must demonstrate how the project will be implemented by or in partnership with one or more of the following entities:

- (a) Community colleges (as defined in the NIA)
- (b) Historically Black colleges and universities (as defined in the NIA)
- (c) Tribal Colleges and Universities (as defined in the NIA)
- (d) Minority-serving institutions (as defined in the NIA)

Strengths:

N/A

Weaknesses:

N/A

Reader's Score: 0

Competitive Preference Priority - Competitive Preference Priority 2

1. Competitive Preference Priority 2:

Addressing the Impact of COVID-19 on Students, Educators, and Faculty: Community Asset-Mapping and Needs Assessment and Evidence-Based Instructional Approaches and Supports (up to 3 points).

Projects that are designed to address the impacts of the COVID-19 pandemic, including impacts that extend beyond the duration of the pandemic itself, on the students most impacted by the pandemic, with a focus on underserved students and the educators who serve them through the following priority areas:

- (a) Conducting community asset-mapping and needs assessments that may include an assessment of the extent to which students, including subgroups of students, have become disengaged from learning, including students not participating in in-person or remote instruction, and specific strategies for reengaging and supporting students and their families; and
- (b) Using evidence-based instructional approaches and supports, such as professional development, coaching, ongoing support for educators, high-quality tutoring, expanded access to rigorous coursework and content across K-12, and expanded learning time to accelerate learning for students in ways that ensure all students have the opportunity to successfully meet challenging academic content standards without contributing to tracking or remedial courses.

Strengths:

The applicant will implement high-impact tutoring as a key strategy to support student literacy development (p. e22). High-needs students will be selected by school staff based on demonstrated need for intervention through English Language Arts assessments, report cards, and teacher input (p. e108).

The method has been documented to be effective at accelerating student learning (p. e23). Supportive strategies include (1) establishing trust relationships between high-needs students and tutors and (2) providing high-quality literacy materials (pp. e19-e20, pp. e22-e24). These strategies are also documented to address the impact of the COVID-19 pandemic.

Weaknesses:

No weakness found.

Reader's Score: 3

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Technical Review Coversheet

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	30	30
Quality of Project Personnel		
1. Project Personnel	10	10
Quality of the Management Plan		
1. Management Plan	10	8
Sub Total	70	68
Priority Questions		
Competitive Preference Priority		
Competitive Preference Priority 1		
1. Promoting Equity	3	0
Competitive Preference Priority 2		
1. Impact of COVID-19	3	1
Sub Total	6	1
Total	76	69

Technical Review Form

Panel #13 - Early Tier 1 - 13: 84.411C

Reader #2: *****

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Questions

Selection Criteria - Significance

1. The Secretary considers the significance of the proposed project. In determining the significance of the proposed project, the Secretary considers the following factor:

Reader's Score: 20

Sub

1. (1) The extent to which the proposed project involves the development or demonstration of promising new strategies that build on, or are alternatives to, existing strategies. (20 points)

Strengths:

The applicant has proposed a project that involves providing high-impact literacy tutoring to high-needs students in grades 2-4 in Memphis, TN (p. e13). The Tutor901 program would be expanded upon with three innovations: 1) equipping tutors to make tutoring sessions trust-filled, 2) recruiting tutors reflective of the students tutored, and 3) providing student and family support beyond tutoring (p. e16). The applicant has provided clear evidence of the need for the program, as evidenced by literacy data from the past six years, with less than 25% of students in the target population meeting proficiency on ELA testing (p. e14).

Weaknesses:

No weaknesses were identified.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

Reader's Score: 30

Sub

1. (1) The extent to which there is a conceptual framework underlying the proposed research or demonstration activities and the quality of that framework. (10 points)

Sub

Strengths:

The applicant has proposed a project that posits that “recruiting individuals representative of the students they serve and equipping them to provide intentional literacy support aligned to in-class instruction in a nurturing, small group setting will accelerate student’s literacy development and increase students’ sense of belonging within the connection to school” (p. e19). The four main inputs for the program include high-impact tutoring, student-tutor bonding, employing tutors reflective of students served, and distribution of high-quality texts (pp. e19-e20). The logic model provided in Appendix G (p. e78) details how the proposed inputs and activities are designed to impact the short-term Social Emotional Learning (SEL) and academic outcomes as well as the long-term outcomes of an increased number of students reading on grade level and fewer chronically absent students.

Weaknesses:

No weaknesses were identified.

Reader's Score: 10

2. (2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable. (5 points)

Strengths:

The applicant has outlined four goals, including: 1) providing high-impact tutoring to 1,500 students, 2) students forming relationships with tutors, 3) developing a pipeline of trained and qualified tutors and educators, and 4) infusing literacy resources into schools and families (pp. e21-e22). The goals are broken down into objectives in Table 3 (pp. e21-e22). The objectives are reasonably calculated to meet the project goals. Each outcome is quantifiable, and an achievement criterion has been included.

Weaknesses:

No weaknesses were identified.

Reader's Score: 5

3. (3) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs. (15 points)

Strengths:

The applicant has indicated that the project is designed to target high-needs students, defined as a student living in poverty, a student attending a school with a high concentration of students living in poverty, a student of color, and/or a student performing significantly below grade level (p. e13). The program will be implemented with 1,500 students in grades 2-4. Demographic data about the implementation area indicate that it meets this definition (p. e14). Student outcomes, including academic test scores and SEL measures, are identified in the research questions as an area of focus for the project (p. e35). The applicant has clearly communicated a plan to meet the needs of the identified target population.

Weaknesses:

No weaknesses were identified.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers the following factor:

Reader's Score: 10

Sub

1. (1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. In addition, the Secretary considers the qualifications, including relevant training and experience, of key project personnel. (10 points)

Strengths:

The applicant has assembled a team that includes people with experience in conducting and managing large-scale projects (p. e25-e26). They intend to partner with the Center for Research in Educational Policy (CREP) at the University of Memphis to provide research design and program evaluation. As a result, they have assembled a team with the expertise to execute the clinical, research, and operational components of the project. The current staff includes many people from diverse backgrounds, as indicated in Table 4 (p. 25). The applicant has indicated a clear commitment to recruiting and hiring individuals from diverse backgrounds as a project priority (p. e13).

Weaknesses:

No weaknesses were identified.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan

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

Reader's Score: 8

Sub

1. (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.

Strengths:

The applicant has provided a project timeline in Table 5 (pp. e28-e30). The 13 project milestones are broken down by quarter, and responsible parties are listed for each milestone.

Weaknesses:

The applicant has not clearly indicated a plan for regular staff meetings from different project components to coordinate and monitor progress. The applicant has not included any pay increases for staff over the five years of the study. Without regular cost-of-living or merit pay increases, there is a risk of staff turnover, which could be detrimental to the project (pp. e86-e94).

Sub

Reader's Score: 8

Priority Questions

Competitive Preference Priority - Competitive Preference Priority 1

1. Competitive Preference Priority 1:

Promoting Equity in Student Access to Educational Resources and Opportunities: Implementers and Partners (up to 3 points)

Under this priority, an applicant must demonstrate how the project will be implemented by or in partnership with one or more of the following entities:

- (a) Community colleges (as defined in the NIA)
- (b) Historically Black colleges and universities (as defined in the NIA)
- (c) Tribal Colleges and Universities (as defined in the NIA)
- (d) Minority-serving institutions (as defined in the NIA)

Strengths:

No reference to specified entities noted.

Weaknesses:

The applicant has not demonstrated how the project will be implemented by or in partnership with any of the identified competitive preference entities.

Reader's Score: 0

Competitive Preference Priority - Competitive Preference Priority 2

1. Competitive Preference Priority 2:

Addressing the Impact of COVID-19 on Students, Educators, and Faculty: Community Asset-Mapping and Needs Assessment and Evidence-Based Instructional Approaches and Supports (up to 3 points).

Projects that are designed to address the impacts of the COVID-19 pandemic, including impacts that extend beyond the duration of the pandemic itself, on the students most impacted by the pandemic, with a focus on underserved students and the educators who serve them through the following priority areas:

- (a) Conducting community asset-mapping and needs assessments that may include an assessment of the extent to which students, including subgroups of students, have become disengaged from learning, including students not participating in in-person or remote instruction, and specific strategies for reengaging and supporting students and their families; and
- (b) Using evidence-based instructional approaches and supports, such as professional development, coaching, ongoing support for educators, high-quality tutoring, expanded access to rigorous coursework and content across K-12, and expanded learning time to accelerate learning for students in ways that ensure all students have the opportunity to successfully meet challenging academic content standards without contributing to tracking or remedial courses.

Strengths:

The applicant has not clearly communicated an intent to address this competitive preference priority. However, they have referenced a sense of disconnection from school as a long-run effect of COVID-19, and their project aims to address this factor (p. e23).

Weaknesses:

The applicant has not clearly identified an intent to address this competitive preference priority.

Reader's Score: 1

Status: Submitted

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Technical Review Coversheet

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	30	30
Quality of Project Personnel		
1. Project Personnel	10	10
Quality of the Management Plan		
1. Management Plan	10	10
Sub Total	70	70
Priority Questions		
Competitive Preference Priority		
Competitive Preference Priority 1		
1. Promoting Equity	3	0
Competitive Preference Priority 2		
1. Impact of COVID-19	3	3
Sub Total	6	3
Total	76	73

Technical Review Form

Panel #13 - Early Tier 1 - 13: 84.411C

Reader #3: *****

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Questions

Selection Criteria - Significance

1. The Secretary considers the significance of the proposed project. In determining the significance of the proposed project, the Secretary considers the following factor:

Reader's Score: 20

Sub

1. (1) The extent to which the proposed project involves the development or demonstration of promising new strategies that build on, or are alternatives to, existing strategies. (20 points)

Strengths:

The proposed Tutor901 program aims to enhance high-impact tutoring by integrating three key strategies designed to support high-needs students: (1) creating trust-filled and supportive environments during tutoring sessions; (2) recruiting, training, and retaining tutors who reflect the backgrounds of the students they serve; and (3) offering targeted support for students and their families beyond the tutoring sessions (pp. e13-e14).

The expected outcomes for the proposed project include accelerated progress toward grade-level proficiency in reading and enhanced social-emotional learning (SEL) outcomes through strengthened connections with their tutors (p. e9).

A detailed summary outlines the evidence-based strategies that support the promising approaches employed in the proposed project. Table 2 illustrates the alignment between the research-based best practices of high-impact tutoring programs and the key components of the Literacy Mid-South (LMS) Tutor901 program (pp. e15-e16).

An example of these alignments is in the program characteristic of dosage, where research-based best practices recommend providing each student with at least three 30-minute tutoring sessions per week. In contrast, the LMS Tutor901 program will offer three 45-minute sessions per week (p. e15).

Weaknesses:

No weaknesses noted.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

Reader's Score: 30

Sub

- 1. (1) The extent to which there is a conceptual framework underlying the proposed research or demonstration activities and the quality of that framework. (10 points)**

Strengths:

The Tutor901 program's conceptual framework integrates the effectiveness of high-impact tutoring with best practices customized to support high-needs students (p. e19).

The various interventions support the quality of the conceptual framework and guide the proposed activities for project implementation, all aimed at boosting student achievement. Examples of these interventions include reducing class sizes and extending learning time (p. e19).

The Logic Model offers a comprehensive overview of the quality of the conceptual framework that supports the provision of tutoring aligned with all research-supported elements of high-impact tutoring, aimed at helping more high-needs students achieve grade-level reading. It details the inputs, activities, intended outcomes, and both short-term and long-term results (p. e78).

For instance, in the case of the activity involving intensive tutor training (academic and social-emotional learning), the output is that 1,500 students in grades 2 to 4 receive tutoring each year. The long-term academic outcomes include a greater number of high-needs Memphis-Shelby County Schools (MSCS) students reading at grade level, while the social-emotional learning outcomes show fewer high-needs students experiencing chronic absenteeism (p. e78).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

- 2. (2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable. (5 points)**

Strengths:

The applicant outlines four primary goals, each accompanied by specific objectives, anticipated outcomes, and metrics for measuring progress, as detailed in Table 3 (pp. e21-e22). The proposed goals for this program are: (1) Enhance students' literacy growth through effective tutoring; (2) Foster trusting and secure learning environments during tutoring sessions; (3) Develop a robust pipeline of well-trained and diverse tutors; and (4) Promote the intentional inclusion of high-quality, culturally responsive literature (p. e10).

The associated objectives are clear, measurable, and aligned with the project's goals. For example, Objective 2.1 emphasizes the development of trusting and impactful relationships between students and tutors, with the expected outcome being that 90% of students report enjoying their tutoring experience in end-of-year surveys (p. e21).

Weaknesses:

No weaknesses noted.

Sub

Reader's Score: 5

3. (3) The extent to which the design of the proposed project is appropriate to, and will successfully address, the needs of the target population or other identified needs. (15 points)

Strengths:

The proposed project aims to support 1,500 high-needs students in grades 2 through 4 each school year across 18 MSCS elementary schools, which are classified as economically disadvantaged by the state of Tennessee (p. e10).

The applicant provides statistics showing that the greater Memphis community has an overall poverty rate of 15.7% and a childhood poverty rate of 22.4%. Within the areas served by MSCS, 55% of students are classified as economically disadvantaged. Additionally, 93% of the 105,000 students in MSCS identify as Black/African American, Hispanic, or Native American (p. e14).

Furthermore, Table 1 shows that Memphis-Shelby County Schools has consistently had no more than 24% of elementary students achieving grade-level reading proficiency. Specifically, the grade-level proficiency rates on the MSCS elementary student ELA standardized assessment were 14% in 2021, 23% in 2022, and 24% in 2024 (p. e14).

The proposed project aims to address four critical needs in Memphis through the following strategies: (1) identifying high-impact tutoring as a key method for enhancing students' literacy development, (2) creating a supportive educational environment through tutoring, (3) establishing a diverse pipeline of highly-trained tutors and future educators, and (4) supplying students participating in tutoring with new, high-quality books that are culturally relevant and positively represent their identities.

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - Quality of Project Personnel

1. The Secretary considers the quality of the personnel who will carry out the proposed project. In determining the quality of project personnel, the Secretary considers the following factor:

Reader's Score: 10

Sub

1. (1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability. In addition, the Secretary considers the qualifications, including relevant training and experience, of key project personnel. (10 points)

Strengths:

The research team for the proposed project possesses the necessary training, expertise, and experience to successfully execute the initiative. For instance, the Tutor Support Manager is an experienced educator with a strong background in early literacy skills and tutoring interventions. The Senior Director of Strategy & Innovation is an interventionist who has designed literacy interventions for both in-school and out-of-school settings (p. e26).

Sub

Moreover, the detailed resumes of key personnel in Appendix B highlight their experience in implementing intervention programs. Additionally, the applicant mentions that its partner, the Center for Research in Education Policy (CREP), is a long-standing contributor to the field of educational research. CREP brings extensive experience in research design, execution, and program evaluation, along with proven expertise in literacy and urban education reform (p. e25).

The applicant notes that Literacy Mid-South has a strong history of hiring and retaining high-quality, diverse employees. As a Black-led nonprofit, 62% of LMS staff identify as people of color, including 50% of the leadership team, while 71% of the staff are women, comprising 67% of the leadership team (p. e24).

Furthermore, Table 4 reinforces their commitment to recruiting tutors from diverse backgrounds who reflect the students receiving tutoring (p. e25).

Weaknesses:

No weaknesses noted.

Reader's Score: 10

Selection Criteria - Quality of the Management Plan

- 1. The Secretary considers the quality of the management plan for the proposed project. In determining the adequacy of resources and quality of the management plan for the proposed project, the Secretary considers the following factors:**

Reader's Score: 10

Sub

- 1. (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.**

Strengths:

The applicant outlines the project's 13 key milestones, including the timeline and responsible organizations, in Table 5 (pp. e28-e30). For instance, Milestone 9, which involves ongoing professional development and observations for tutors, occurs quarterly each year, with LMS and the Tutor Support Managers (TSM) overseeing these activities (p. e29).

Furthermore, a summary emphasizes the leadership roles of four key individuals who will contribute to the successful execution of the project objectives. The Chief Executive Officer (CEO), Senior Director of Strategy & Innovation (SD), Manager of Data & Evaluation (DM), and Tutor Support Managers (TSM) are all essential to the project's implementation (p. e27).

Weaknesses:

No weaknesses noted.

Sub

Reader's Score: 10

Priority Questions

Competitive Preference Priority - Competitive Preference Priority 1

1. Competitive Preference Priority 1:

Promoting Equity in Student Access to Educational Resources and Opportunities: Implementers and Partners (up to 3 points)

Under this priority, an applicant must demonstrate how the project will be implemented by or in partnership with one or more of the following entities:

- (a) Community colleges (as defined in the NIA)
- (b) Historically Black colleges and universities (as defined in the NIA)
- (c) Tribal Colleges and Universities (as defined in the NIA)
- (d) Minority-serving institutions (as defined in the NIA)

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Competitive Preference Priority - Competitive Preference Priority 2

1. Competitive Preference Priority 2:

Addressing the Impact of COVID-19 on Students, Educators, and Faculty: Community Asset-Mapping and Needs Assessment and Evidence-Based Instructional Approaches and Supports (up to 3 points).

Projects that are designed to address the impacts of the COVID-19 pandemic, including impacts that extend beyond the duration of the pandemic itself, on the students most impacted by the pandemic, with a focus on underserved students and the educators who serve them through the following priority areas:

- (a) Conducting community asset-mapping and needs assessments that may include an assessment of the extent to which students, including subgroups of students, have become disengaged from learning, including students not participating in in-person or remote instruction, and specific strategies for reengaging and supporting students and their families; and
- (b) Using evidence-based instructional approaches and supports, such as professional development, coaching, ongoing support for educators, high-quality tutoring, expanded access to rigorous coursework and content across K-12, and expanded learning time to accelerate learning for students in ways that ensure all students have the opportunity to successfully meet challenging academic content standards without contributing to tracking or remedial courses.

Strengths:

The applicant proposes a project that will tackle one of the lasting effects of the COVID-19 pandemic: students' heightened sense of disconnection from school (p. e23). For instance, during the 2022-2023 school year, Memphis-Shelby County Schools experienced a chronic absenteeism rate of 28%. The applicant intends to enhance high-needs students' attachment to school and reduce chronic absenteeism by fostering caring relationships with adults and recruiting a diverse pool of highly trained tutors and future educators.

Weaknesses:

No weaknesses noted.

Reader's Score: **3**

Status: Submitted
Last Updated: 09/16/2024 12:45 PM

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

Status: Submitted

Last Updated: 10/02/2024 07:37 PM

Technical Review Coversheet

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Project Evaluation		
1. Project Evaluation	30	26
Sub Total	30	26
Total	30	26

Technical Review Form

Panel #23 - Early Tier 2 - 24: 84.411C

Reader #2: *****

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Questions

Selection Criteria - Quality of the 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 following factors:

Reader's Score: 26

Sub

1. (1) The extent to which the methods of evaluation will, if well implemented, produce evidence about the project's effectiveness that would meet the What Works Clearinghouse standards with or without reservations as described in the What Works Clearinghouse Handbook (as defined in this notice). (20 points)

Strengths:

Researchers from the Center for Research in Education Policy (CREP) at the University of Memphis will serve as the project evaluators (e14). The Center has extensive experience in research design, execution, and program evaluation, and specializes in quasi-experimental designs and randomized controlled trials with knowledge around the What Works Clearinghouse (WWC) procedures and standards (e25, e30). Further, the bio-sketches provided on e39-48 for the specific CREP staff identified to complete the evaluation provide strong evidence that suggests the CREP staff are well-qualified, and hold the expertise needed to conduct the evaluation. Taken together, this information suggests CREP is a qualified evaluation partner and has the experience and expertise needed to successfully conduct an evaluation study that would meet the WWC standards.

To evaluate the impact of the Tutor901 program, evaluators will use a quasi-experimental design (QED) study that will involve 36 schools, 144 tutors, and 1,200 students from the Memphis-Shelby County Schools (e9, e31). The proposed sample size and composition for the study would satisfy the WWC requirement for a QED study to meet standards with reservations (e.g., 350 participants across multiple sites).

Evaluators will match participating schools at the school-level based on publicly available data on factors such as grade levels taught, prior student performance on tests of reading/English Language Arts (ELA), and student demographics (e.g., socioeconomic status). The identified set of variables is reasonable and meets WWC guidelines for creating matched samples of schools in the treatment and comparison conditions (e31).

The applicant includes both main and supplemental findings as part of the evaluation (e31). Main findings will examine the effects of program implementation for the overall sample for student's reading achievement, as measured by the Tennessee Comprehensive Assessment Program's (TCAP) ELA assessment. Supplemental findings will include an examination of the impacts on social and emotional learning (SEL) outcomes as well as sub-group analysis to measure effects within high-needs student subgroups (e9, e31). Including both main and supplemental findings in the evaluation is in alignment with the WWC review process and is a strong approach to the study design.

The measures that have been selected for the study meet the WWC standards for validity and reliability. For

Sub

example, the study will use the iReady and TCAP standardized assessment scores to measure student's academic achievement (e31). The Panorama Student survey will be used to measure SEL outcomes, which is a validated SEL measure (e33). Finally, the Literacy Observation Tool (LOT) will also be used as part of the assessment framework, which is a valid and reliable tool for measuring the effectiveness of literacy strategies (e34).

Weaknesses:

The applicant provides an incomplete discussion on the procedures they will apply to adjust for baseline equivalence if necessary. While the applicant notes on e33 that if "baseline equivalence is met (based on $g \leq 0.25$) the study design will produce evidence with the potential to meet WWC standards with reservations if sample attrition is sufficiently low." This description does not address what additional statistical adjustments would be made if Hedge's g is found to be between 0.05 and less than 0.25. As noted in the WWC Handbook, baseline equivalence is satisfied if the absolute value of the effect size is less than or equal to 0.05 SD, which means no further statistical adjustments are necessary, however, if Hedge's g is between 0.05 and less than 0.25 additional statistical adjustments are required to satisfy baseline equivalence. Additional information is needed to understand the complete process for establishing baseline equivalence for the QED study.

The applicant does not provide sufficient information on the strategies they will use to ensure attrition will be low or what safeguards will be in place if high levels of attrition are present.

Reader's Score: 17

2. (2) The extent to which the methods of evaluation will provide performance feedback and permit periodic assessment of progress toward achieving intended outcomes. (5 points)

Strengths:

The evaluation timeline on e81 includes several opportunities for evaluators to collect performance feedback. For example, observations and Tutor901 stakeholder surveys will be administered twice a year (fall and spring), which is a sufficient timeline to collect performance feedback that can be used to drive continuous improvement. Similarly, focus groups will be conducted with a subset of participants across all treatment schools once a year during years 2-4 (e35, e81). This is an acceptable timeline for focus groups and will produce key findings that can be used to shape the next year's services.

Evaluators will produce an annual evaluation report each year (e81), which is an appropriate timeline to assess progress toward achieving intended outcomes for that year.

Weaknesses:

It is unclear why the evaluation reporting structure only includes a Formative Brief in Year 1 (e81), as this timeline may limit the applicant's ability to periodically assess the project's progress toward achieving the intended outcomes throughout each grant year.

Reader's Score: 4

3. (3) The extent to which the evaluation plan clearly articulates the key project components, mediators, and outcomes, as well as a measurable threshold for acceptable implementation. (5 points)

Strengths:

A detailed table is provided on e15 that aligns the Tutor901 intervention components to the research-based best practices for high-impact tutoring. For example, the table notes that research-based best practices suggest that

Sub

high-impact tutoring requires at least three 30-minute tutoring sessions per week and the Tutor901 intervention includes three 45-minute sessions per week. Throughout this table the applicant provides a strong description of the intervention. Further, the applicant clearly describes the three innovative and promising strategies they will layer into the proven high-impact tutoring framework (e16-17). Specifically, the Tutor901 program will include: equipping tutors to make tutoring sessions trust-filled, supportive learning environments; recruiting, training, and retaining tutors reflective of students tutored; and providing intentional student and family support beyond tutoring (e9, e16-19).

The applicant adequately outlines the project’s measurable thresholds for acceptable implementation in the table on e21-22. For example, the applicant notes under goal 1 that they expect 1,500 high-needs students will receive one year of high-impact tutoring (45-minute sessions, 3 session per week, 24 weeks per year, 3:1 student-to-teacher ratio) each year. This goal is easily measured and well-defined. Similarly, the applicant clearly articulates the thresholds for success for each outcome included in the table (e21-22). For example, 90% of tutors report receiving high-quality professional development and support (e.g., coaching, observations, and ongoing feedback) throughout the semester. The structure of the applicant’s outcomes includes the measurable threshold, operational definition of the outcome, and an established timeline, which represents a strong approach to goal setting.

In the table on e35-36 the applicant notes that fidelity of implementation and school environments may mediate the degree to which the intervention outcomes will be successful. For example, they state the extent to which tutor implement the Tutor901 program with fidelity may mediate observed student achievement and SEL outcomes. This is a reasonable mediator variable to include in the impact study.

Weaknesses:

No weaknesses noted.

Reader's Score: 5

Status: Submitted
Last Updated: 10/02/2024 07:37 PM

Status: Submitted

Last Updated: 10/08/2024 11:02 AM

Technical Review Coversheet

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of the Project Evaluation		
1. Project Evaluation	30	26
Sub Total	30	26
Total	30	26

Technical Review Form

Panel #23 - Early Tier 2 - 24: 84.411C

Reader #3: *****

Applicant: LITERACY MIDSOUTH INC (S411C240220)

Questions

Selection Criteria - Quality of the 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 following factors:

Reader's Score: 26

Sub

1. (1) The extent to which the methods of evaluation will, if well implemented, produce evidence about the project's effectiveness that would meet the What Works Clearinghouse standards with or without reservations as described in the What Works Clearinghouse Handbook (as defined in this notice). (20 points)

Strengths:

The external evaluator, CREP, has significant research experience and expertise including designing studies to meet WWC standards (e30). CREP has led the evaluation of several multi-year projects that have met WWC standards without reservations. CREP also has previous experience with evaluations of literacy interventions. Their previous experience is well-aligned with the study proposed in the application.

The applicant proposes a matched-pair QED which has strong potential to meet WWC standards with reservations if well-implemented (e31). The study design will include a nested approach (students within schools) and the applicant provides an adequate description of the study design to be used to meet WWC standards with reservations.

Schools will be matched based on both student performance and student demographics to increase the likelihood that baseline equivalency will be attained (e31). This is a reasonable approach which has the potential to meet WWC requirements for QED studies.

The main assessment outcome is clearly defined. Standardized assessment measures of student achievement will be used. These provide valid and reliable assessments of outcomes which are likely to meet WWC standards (e31).

The proposed sample will include 36, schools, 144 tutors and 1,200 students annually which is a sufficiently large sample size.

Table 6 clearly identifies the achievement outcomes for each cohort, including the data that will be collected at each grade level for each cohort. This information provides confidence that the defined outcomes that meet WWC standards can be measured during the grant period (e32).

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Weaknesses:

In order for the evaluation to meet WWC standards with reservations, the sample attrition will need to be sufficiently low. The applicant does not provide any discussion on whether there is an expectation that attrition will be low in their sample or any explanation of the strategies that will be implemented to mitigate attrition. Without this information, it is difficult know if this will impact the ability to meet WWC standards.

Reader's Score: 17

2. (2) The extent to which the methods of evaluation will provide performance feedback and permit periodic assessment of progress toward achieving intended outcomes. (5 points)

Strengths:

The program characteristics of high-quality implementation are clearly defined and measurable (e15-16) (e.g., the dosage, materials, instructional practices and group sizes). The clear metrics established for these program characteristics and the data collection plan associated with these metrics will ensure there is ongoing performance feedback related to whether implementation measures are being met.

Data will be collected across multiple stakeholder groups engaged in the project including tutors, administrators, classroom teachers and students (e33). A combination of data collection tools will be used including observation, surveys, and focus groups (e36). This represents a comprehensive approach to inform ongoing assessment of progress towards achieving intended outcomes.

A timeline is provided that establishes a plan for frequency of data collection (e81). The timeline includes multiple data collection strategies incorporated throughout each program year.

Weaknesses:

There is not a clear communication plan for providing feedback to stakeholders. Without this information, it is difficult to assess the manner and timing for incorporating feedback for program improvement.

Reader's Score: 4

3. (3) The extent to which the evaluation plan clearly articulates the key project components, mediators, and outcomes, as well as a measurable threshold for acceptable implementation. (5 points)

Strengths:

Table 3 lays out clear goals and objectives with measurements and measurable thresholds for acceptable implementation for each objective (e21). For example, targets are provided for the number of students to receive tutoring and the percent that will have improved confidence in their reading abilities. These targets will be used to measure the success of the project.

The logic model articulates key project components (e.g., tutor training, high-impact tutoring sessions) which have clear connections to short-term outcomes (e.g., academic outcomes such as reading ability and SEL outcomes such as trusting relationships) that are measurable during the grant period (e78).

Mediating factors are identified in Table 7 (e35-36). For example, the extent to which tutors implement the program with fidelity is identified as a mediator of student achievement.

Validity of survey instruments and observation protocols are identified. For example, the validity of the Literacy Observational Tool is provided (e34). Information about the validity and reliability of the survey tools provides confidence in the conclusions that will be able to be drawn from the evaluation.

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Weaknesses:

No weaknesses are noted.

Reader's Score: 5

Status: Submitted

Last Updated: 10/08/2024 11:02 AM