

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

Status: Submitted

Last Updated: 06/28/2023 04:51 PM

Technical Review Coversheet

Applicant: Bluum, Inc. (S282A230005)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	35	27
Quality of Eligible Applicants Receiving Subgrants		
1. Eligible Applicants	15	15
State Plan		
1. State Plan	35	23
Quality of the Management Plan		
1. Management Plan	15	11
Sub Total	100	76
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP1	1	1
Sub Total	1	1
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP2	2	2
Sub Total	2	2
Competitive Preference Priority 3		
Competitive Preference Priority 3		
1. CPP3	2	1
Sub Total	2	1
Competitive Preference Priority 4		
Competitive Preference Priority 4		
1. CPP4	2	2
Sub Total	2	2
Competitive Preference Priority 5		
Competitive Preference Priority 5		
1. CPP5	3	2
Sub Total	3	2

Total

110

84

Technical Review Form

Panel #14 - State Entities - 3: 84.282A

Reader #1: *****

Applicant: Bluum, Inc. (S282A230005)

Questions

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:

Reader's Score: 27

Sub

1. The extent to which the proposed project demonstrates a rationale;

Strengths:

The proposed project is built around three areas: 1. School seats in Idaho are tight, 2. The charter schools system has a history of being high performing, and 3. Parent demand and public support for charter schools is robust (p. e24/narrative p. 10). The applicant has built a solid argument around these areas as evidence for the project outcomes. The evidence cited includes findings from a study commissioned by the applicant and based on the 2020 U.S. Census, which projected Idaho K-8th grade population will require more new schools by 2030 (p. e25/narrative 11). Additionally, the applicant presented the 2022 Idaho NAEP Results data set as evidence that charter schools have a history of outperforming traditional LEA's in Idaho. Further, the applicant details evidence around parent demand and public support for charter schools via the number of students on charter school waitlists coupled with the positive results of charter school parental surveys and bipartisan legislative support. Finally, the applicant's logic model demonstrates the proposal's theory of action and identifies the key components that merge the rational and end goals of the proposal (p. e30/narrative p. 16).

Weaknesses:

No weakness noted.

Reader's Score: 5

2. 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 and will produce quantitative and qualitative data to the extent possible; and

Strengths:

The proposal includes evaluation methods that could be used to adequately measure performance of key outcomes. Objective 1 SMART goals, Objective 2 SMART goal 2.1, and Objective 3 SMART goals will produce quantitative data from which measure progress toward key proposal outcomes.

Sub

Weaknesses:

One weakness of the proposed evaluation methods is the lack of specificity of increasing the percentage of charter schools in authorizer annual reports with overall scoring in “Good Standing” or higher (p. e32/narrative p. 18). The level of increase should be explicitly stated so as to properly gauge achievement. The lack of specificity calls into question the proposal’s ability to adequately measure achievement related to a key intended project outcome.

Reader's Score: 3

3. The ambitiousness of the State entity’s objectives for the quality charter school program carried out under the CSP State Entity program

Strengths:

The applicant is building the proposal around proven practices that allowed Idaho charter schools to provide over 11,000 new school seats with a previous grant. The applicant is ambitiously proposing to increase new charter school seats by at least 5,900 while taking into account the rising ancillary cost of running charter schools (p. e17/narrative p. 3). The projected increase is ambitious but attainable as evidenced by the applicant’s prior successes of delivering 33 percent more seats than promised in the previous CSP grant (p. e15/narrative p. 1). The applicant’s previous success is built around the support of the J.A. and Kathryn Albertson Family Foundation which the applicant expects to continue into the near future as evidence by the included letter of support from the Albertson Family Foundation (p. e100-101).

Weaknesses:

No weakness noted.

Reader's Score: 5

4. The extent to which the projected number of subgrant awards for each grant project year is supported by evidence of demand and need, and the extent to which the proposed average subgrant award amount is supported by evidence of the need of applicants

Strengths:

The proposal alludes to the type of charter schools that will be funded by including applicant funded research results indicating that the number of Hispanic students in Idaho are growing and that Idaho Special Education students are performing better in charter schools (p. e36-37/narrative p. 22-23). Thus, providing evidence of the extent and need for funding the proposal. Additionally, the applicant makes a compelling case for reducing the number of subgrants but increasing the amount of each sub-grant funding as the cost of business has increased from the previous grant funding.

Weaknesses:

The proposal does not articulate clearly the methodology for choosing the stated number of subgrant awards. Additionally, there does not provide supporting documentation the calculations used to determine the average subgrant award amount.

Reader's Score: 14

Selection Criteria - Quality of Eligible Applicants Receiving Subgrants

- 1. The likelihood that the eligible applicants receiving subgrants under the program will meet the State entity’s objectives for the quality charter school program and improve education results for students.**

Strengths:

The applicant outlines a robust subgrant application process which builds on prior success from current CSP grant funding (p. e43/narrative p. 29). The applicant plan includes utilizing multiple channels and partners (social media network, Idaho Charter School Network/partner networks, the ID State Department of Education) to publicize subgrant opportunities. The subgrant application process will include peer review with trained experts serving members of the review team. Each subgrant applicant must have a prior charter agreement and itemized budget to submit as part of the CSP grant application (p. e45/narrative p. 31). The applicant included a robust Draft RFA Rubric Framework for Subgrant Narrative (p. e46-47/narrative p. 32-33). Finally, each subgrant will undergo Management and Finance Budget Review prior to funding. The applicant has included a robust plan likely to result in quality charter school receiving funding which will improve educational outcomes for Idaho students.

Weaknesses:

No weakness noted.

Reader's Score: 15

Selection Criteria - State Plan**1. The State entity's plan to--**

Reader's Score: 23

Sub**1. Adequately monitor the eligible applicants receiving subgrants under the State entity's program;****Strengths:**

The applicant is building on prior success to establish robust monitoring plans which include a team of charter school experts (p. e 53/narrative p. 39). Thus, the applicant has a plan rooted in Idaho's performance-based accountability system to ensure eligible applicants are transparent in reporting milestones and outcomes. The applicant includes a generalized Monitoring Timeline Table which includes activities and timeframe (p. e54/narrative p. 40). The applicant proposes to include the Idaho School Boards Association (ISBA) board governance training programs with each subgrantee. The complete monitoring process is presented in the application as Attachment 11. The monitor plan is built around the 7 key indicators for success which are tied to the previously cited methods of evaluation.

Weaknesses:

The proposal lacks critical details in explaining how monitors will be trained to thus calling into question the overall plans ability to ensure achievement of key project outcomes. Further, the proposal does not indicate how the applicant will evaluate the subgrantees' sustainability plan.

Reader's Score: 7

2. Work with the authorized public chartering agencies involved to avoid duplication of work for the charter schools and authorized public chartering agencies;

Sub

Strengths:

The applicant has a history of successfully funding (via subgrants), monitoring, evaluating, and overseeing start up charter schools in Idaho, thus the proposal includes a good faith plan to work with state agencies and authorizers to avoid duplication of work (p. e57-58/narrative p.43-44). This plan includes working with IPCSC, the Idaho Charter School Network and individual LEA's to reduce unnecessary bureaucracy for subgrantees. As an example of this, while the applicant's application and monitoring will remain independent and separate to that of charter school authorizers, the applicant will utilize the data and findings included in school performance certificates to determine whether a school seeking a grant for expansion meets the definition of high quality (p.e58/narrative p. 44).

Weaknesses:

The applicant does not adequately detail how they will work to significantly reduce the burden for the authorized public agencies beyond currently available measures.

Reader's Score: 3

3. Provide technical assistance and support for--

- i. The eligible applicants receiving subgrants under the State entity's program; and**
- ii. Quality authorizing efforts in the State;**

Strengths:

Relying on measures which contributed to prior success, the applicant proposes to provide multiple types of technical assistance and support via consultations, coordination of school trainings, pre-opening guidance in project tools, resources, advice, and employee recruitment as well as one on one meeting for assistance (p. e61/narrative p. 47). Additionally, the subgrantees will be required to participate in the existing Idaho Department of Education Charter Start! 101 Workshop to introduce new operators, leaders, and board members to the federal program officers and explain legal and compliance requirements for new school operators, thus ensuring additional support. Finally, the applicant will work with subgrantees to coordinate reaching underserved families (p.e64/narrative p. 50).

Weaknesses:

The applicant does not indicate how specifically the proposal will provide TA around student retention that promotes inclusion of all students, including educationally disadvantaged students nor reducing the overuse of discipline practices that remove students from the classroom. Finally, the proposal does not indicate any activities which will take place prior to risk analysis.

Reader's Score: 7

4. The State entity's plan to solicit and consider input from parents and other members of the community on the implementation and operation of charter schools in the State; and

Strengths:

The applicant does report past years research into Hispanic parents perspectives and desires as a way of strengthening relationships between families and schools (p. e65/narrative p. 51). Additionally, the applicant reports on barriers noticed in rural communities and plans to hold conversations and engagement with parents and community leaders.

Sub

Weaknesses:

The applicant does not explain how they will solicit new input from parents and other members of the community on the implementation and operation of charter schools. Thus, the narrative does not completely address the specific requirement.

Reader's Score: 3

5. The degree of flexibility afforded by the State's charter school law and how the State entity will work to maximize the flexibility provided to charter schools under such law.

Strengths:

The applicant provides the flexibility afforded by the State's charter school law via Table 10: Basic Charter Flexibilities in Idaho Code. The table presents the basic flexibilities such as legal and fiscal autonomy for charter schools, holding multiple charters, and charters ability to contract with EMOs and CMOs for management purposes along with the State Law statute.

Weaknesses:

The applicant does not address how they will work to maximize the flexibility provided to the charter schools. No clear evidence which indicates how the proposal will maximize the flexibility currently encoded in state law.

Reader's Score: 3

Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers:

Reader's Score: 11

Sub

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 proposal contains a generalized management plan which includes partnering with external National and local partners to ensure achievement of objectives on time and within budget (p. e68-71/narrative p. 54-57). Additionally, the proposal contains a plan (Table 11) which outlines specific Objectives, outputs, and outcomes. These measures work together to outline the strength of the performance feedback that will allow periodic assessment of progress.

Weaknesses:

The applicant does not provide evidence of a timeline or milestones to adequately ensure project success. Additionally, the plan does not adequately detail the work of external partners.

Reader's Score: 7

2. The adequacy of procedures for ensuring feedback and continuous improvement in the operation of the proposed project

Sub

Strengths:

The proposal contains an adequate plan for ensuring annual feedback and promoting yearly improvement in the operation of the proposed project via the summarized plan presented in Table 11 (p. e68-71/narrative54-57). In Objective 3 the applicant proposes to coordinate expert research team and key stakeholders in focus groups for both qualitative and quantitative research then to disseminate the results via an annual report "Building on Success for Future Excellence" (p. e71/narrative p. 57).

Weaknesses:

The applicant did not include measures which prompt continuous improvement at set intervals. This calls into question the procedures for ensuring feedback will prompt continuous improvement.

Reader's Score: 2

3. The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project.

Strengths:

The proposal includes a narrative which outlines the time commitment of the project director and key project personnel. This description is appropriate and adequate to meet the stated objectives and ensure achievement of key outcomes.

Weaknesses:

No weakness noted.

Reader's Score: 2

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. To meet this priority, the applicant must demonstrate that the State--

a. Allows at least one entity that is not a local educational agency (LEA) to be an authorized public chartering agency for developers seeking to open a charter school in the State ; or

b. In the case of a State in which LEAs are the only authorized public chartering agencies, the State has an appeals process for the denial of an application for a charter school.

Note: In order to meet this priority under paragraph (b) above, the entity hearing the appeal must have the authority to approve the charter application over the objections of the LEA.

Please specify whether they meet (a) or (b) and clearly explain why in the strengths.

(0 or 1 points)

Strengths:

The applicant states that it is not a state Educational agency, rather a nonprofit statewide charter school support organization. The applicant directly addresses CPP1 on page e20 or narrative page 6 by commenting that the Idaho Public Charter School Commission is the LEA and largest charter school authorizer (60 schools), while local public school

districts authorize 12 charter schools.

Weaknesses:

No weaknesses noted.

Reader's Score: 1

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that ensures equitable financing, as compared to traditional public schools, for charter schools and students in a prompt manner.

(up to 2 points)

Strengths:

The applicant demonstrates that it is located in a state that ensures equitable financing as evidenced by IDAHO Code 33-5208 which provides evidence that Idaho public charter schools receive equal access to state and federal dollars (p. e20/Narrative 6). The applicant goes on to thoroughly explain how Idaho, as a state that funds school districts and charter schools based on position and for specific programs/purposes, allocates funds for Special Education, Alternative School Support, and Transportation equitability.

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 3 - Competitive Preference Priority 3

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that uses best practices from charter schools to help improve struggling schools and LEAs.

(up to 2 points)

Strengths:

The applicant cites two instances where the state is using lessons learned from the last CSP funded project; 1.) A LEA authorized Career Tech School will open in 2024 that will using a charter school model and 2.) According to a previously funder LEA authorized alternative charter school's director, the school is well supported by parents.

Weaknesses:

The applicant did not provide sufficient evidence that the state is using best practices from charter schools to help improve struggling LEA's rather the applicant focused on two successes in charter schools.

Reader's Score: 1

Competitive Preference Priority 4 - Competitive Preference Priority 4

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a State that provides charter schools one or more of the following:

- a) Funding for facilities
- b) Assistance with facilities acquisition
- c) Access to public facilities
- d) The ability to share in bonds or mill levies
- e) The right of first refusal to purchase public school buildings
- f) Low- or no-cost leasing privileges

(up to 2 points)

Strengths:

The applicant provided strong evidence that Idaho has current laws which provide charter schools with partial funding for facilities (p. e22/narrative 8). Further, the applicant cites two new laws which were passed in the 2023 Legislative Session that will further assist charter schools with facility financing.

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 5 - Competitive Preference Priority 5

1. To be eligible to receive points under this priority, a State entity must demonstrate that it supports charter schools that serve at-risk students through activities such as dropout prevention, dropout recovery, or comprehensive career counseling services.

(up to 3 points)

Strengths:

The applicant presents a history of funding subgrants for ancillary services (transportation & reduced cost meals) to remove barriers, as well as specific schools targeting high risk students (teen mothers, English language learners). The applicant has plans to increase English language learners' support as well as rural students (p. e23/Narrative 9).

Weaknesses:

While the applicant provides significant evidence that they serve at-risk students, there is no mention of specific activities to prevent dropouts.

Reader's Score: 2

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Status: Submitted

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Technical Review Coversheet

Applicant: Bluum, Inc. (S282A230005)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	35	31
Quality of Eligible Applicants Receiving Subgrants		
1. Eligible Applicants	15	15
State Plan		
1. State Plan	35	24
Quality of the Management Plan		
1. Management Plan	15	11
Sub Total	100	81
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP1	1	1
Sub Total	1	1
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP2	2	2
Sub Total	2	2
Competitive Preference Priority 3		
Competitive Preference Priority 3		
1. CPP3	2	1
Sub Total	2	1
Competitive Preference Priority 4		
Competitive Preference Priority 4		
1. CPP4	2	2
Sub Total	2	2
Competitive Preference Priority 5		
Competitive Preference Priority 5		
1. CPP5	3	2
Sub Total	3	2

Total

110

89

Technical Review Form

Panel #14 - State Entities - 3: 84.282A

Reader #2: *****

Applicant: Bluum, Inc. (S282A230005)

Questions

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:

Reader's Score: 31

Sub

1. The extent to which the proposed project demonstrates a rationale;

Strengths:

The applicant fully developed a convincing rationale with evidence and data related to population growth and scarcity of student seats in the state (p. e24). Additionally, the applicant is well-positioned in the state to replicate and/or expand charters as evidenced by a previous CSP grant through which they added more than 7000 seats in charters (p. e25-26). Finally, the applicant shows that there is robust parent and public demand for more high-quality charters in the state as provided in parent satisfaction surveys from an evaluation report (p. e27-28).

Weaknesses:

No weaknesses noted.

Reader's Score: 5

2. 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 and will produce quantitative and qualitative data to the extent possible; and

Strengths:

The applicant has a thorough logic model (p. e30) that includes objective performance measures tied to each one of its project goals and outcomes (p. e31-33). The performance measures are appropriate to produce both quantitative and qualitative data on the overall project evaluation, such as increasing charter enrollment, diversifying charter demographics, increasing number of district authorizers, and improving student outcomes in math and reading.

Weaknesses:

The applicant aims to increase charter school performance in authorizer reports (p. e32), but the applicant neither provides a base percent of current charters in good-standing or higher, nor a target percent.

Reader's Score: 4

3. The ambitiousness of the State entity's objectives for the quality charter school program

Sub

carried out under the CSP State Entity program

Strengths:

The applicant demonstrates an ambitious plan to not only replicate and/or expand high-quality charter schools by significantly adding more student seats (roughly 6000 over 5 years), but also aims to improve the quality authorizer practices as well as dissemination of best charter practices in the state (p. e34). The ambitiousness of its plan is evidenced by the applicant's demonstrated efforts to secure additional philanthropic partners and increase funding aggressively to support high-quality charter schools in the state (p. e35).

Weaknesses:

No weaknesses noted.

Reader's Score: 5

4. The extent to which the projected number of subgrant awards for each grant project year is supported by evidence of demand and need, and the extent to which the proposed average subgrant award amount is supported by evidence of the need of applicants

Strengths:

The applicant presents comprehensive data and research from multiple studies and reports on the growing needs for more high-quality charter programs and the changing demographics of its students in the state (p. e36-38), including a CREDO report where charter performance is compared to other schools and another report on the emerging Hispanic communities. The number of subgrantee awards are justified with the needs of the state, as the applicant aims to offer additional seats in rural and Hispanic communities in particular, as well as serve more economically disadvantaged students in general, by attracting more high-quality charter operators (p. e39).

Weaknesses:

The proposal is a little unclear as to the need and extent of the dollar amounts of the subgrantee awards. The increased amount in competition is mentioned to attract and motivate hesitant organizations to apply for startup charters (p. e40), however the significant larger awards compared to its previous CSP grant are not justified by any specific program costs of potential new charters offering alternative programs or focus (such as CTE).

Reader's Score: 17

Selection Criteria - Quality of Eligible Applicants Receiving Subgrants

1. The likelihood that the eligible applicants receiving subgrants under the program will meet the State entity's objectives for the quality charter school program and improve education results for students.

Strengths:

The applicant has a clearly established transparent process and timeline for applications to award subgrants (p. e44). There is a peer-review process built-into the competition with a wide network of reviewers with qualified expertise (p. e45). The applicant previously developed an ED-approved RFA for awarding subgrants and has refined it over the years based on feedback (p. e46). The RFA structure is reasonable to maximize the likelihood of selecting applicants that meet the state's objectives for quality charter school programs and improve educational outcomes for all students, by focusing on all aspects of schooling such as curriculum and instruction, teaching and learning, family engagement and community involvement, staffing, fiscal management, operational effectiveness, school leadership and board governance (p. e46-48).

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - State Plan**1. The State entity's plan to--**

Reader's Score: 24

Sub**1. Adequately monitor the eligible applicants receiving subgrants under the State entity's program;****Strengths:**

The applicant has a well-developed monitoring system that includes a monitoring timeline, activities, and key indicators with data collected by the state (p. e54-56). Site visits to grantees and technical assistance provided are additional strengths of the monitoring system (p. e57). The applicant appears to have a strong team of experts in its staff to monitor eligible applicants adequately. This is also evidenced from its previous CSP award that positioned the applicant to be a resource for other CSP states (p. e54-55).

Weaknesses:

The applicant's proposed / established monitoring system focuses heavily on compliance and there is limited evidence to offer more personalized monitoring and support to each subgrantee to ensure applicants deliver on their proposed projects. Grantee-specific monitoring and support is mentioned when a subgrantee falls short of established performance benchmarks. The monitoring team is vaguely described, and it is unclear how their expertise will match the monitoring needs of subgrantees.

Reader's Score: 7

2. Work with the authorized public chartering agencies involved to avoid duplication of work for the charter schools and authorized public chartering agencies;**Strengths:**

The applicant adequately addresses data collection and integration efforts between authorizers and charter evaluation agencies and the state department of education and indicates their commitment to improve these efforts to reduce redundancies. More specifically, the applicant states that they will utilize data and evaluation reports from authorizers on subgrantees as well as data and findings in school performance certificates from state accountability system, if applicable (p. e58).

Weaknesses:

The narrative does not provide sufficient detail around existing efforts to integrate data among multiple agencies (authorizers, state entity, etc.) and it is not clear what data sharing agreements are in place and to what extent the applicant has access to charter data from other involved agencies.

Reader's Score: 3

Sub

3. Provide technical assistance and support for--

- i. The eligible applicants receiving subgrants under the State entity's program; and**
- ii. Quality authorizing efforts in the State;**

Strengths:

The applicant demonstrates strong ability to provide technical assistance and support to existing charter schools, eligible subgrantees and authorizers including a wide range of operational, financial, legal, and academic supports (p. e59-60). For example, the applicant provides back-office support to charters in the areas of fiscal monitoring, financial planning, budgeting, facilities financing and refinancing, and auditing in fiscal and operational effectiveness (p. e59). Academic coaching and leadership PD was also provided to school leaders during site visits and scheduled training sessions (p. e60).

Weaknesses:

While the applicant has extensive supports and technical assistance available, there is no evidence of a codified support, training, and TA system for subgrantees and authorizers. These efforts seem to be available on-demand and when needed instead of a pre-determined timeline.

Reader's Score: 8

4. The State entity's plan to solicit and consider input from parents and other members of the community on the implementation and operation of charter schools in the State; and

Strengths:

The applicant provides examples of theme-based charter schools in response to needs and/or demands from the parents and the community (p. e63). The narrative also mentions that charter programs / operations align to underserved families, Hispanic families, and rural families by offering a menu of school options focusing on STEM, career/technical education, and trade skills (p. e64).

Additionally, the applicant engages in strategic efforts to raise awareness of charter schools and school choice in underserved communities, specifically rural and Hispanic communities (p. e65).

Weaknesses:

The applicant does not provide data or refer to official reports and/or research studies that demonstrates family/community input is systematically collected to inform charter school implementation and operation. It is not clear how families/communities provide input to the state entity.

Reader's Score: 3

5. The degree of flexibility afforded by the State's charter school law and how the State entity will work to maximize the flexibility provided to charter schools under such law.

Strengths:

The applicant lists several different ways flexibility is afforded to charter schools in the state according to state law, such as allowing multiple types of authorizing agencies, fiscal flexibilities for acquiring and financing facilities, allowing charters to certify their own teachers and administrators to name a few (p. e66-67). Listed flexibilities and protocols for charters are reasonable and adequate to allow growth and operation of charters by maintaining their fiscal, legal, and operational autonomy while holding them accountable to the same expectations and outcomes.

Sub

Weaknesses:

The proposal presents no future plans or works in progress to maximize the flexibility provided to charter schools.

Reader's Score: 3

Selection Criteria - Quality of the Management Plan

1. The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers:

Reader's Score: 11

Sub

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 presents an adequately developed management plan that includes key objectives, activities, and deliverables in Table 11 (p. e68-71). There is a list of management team involved in the implementation of the proposal (p. e72-74).

Weaknesses:

The applicant presents general qualifications and expertise of the grant management team in Table 12 (p. e73-74) but lacks clarity around how these individuals will own and lead specific parts of the project. Furthermore, the management plan in Table 11 does not include a timeline or specific milestones (p. e68-71).

Reader's Score: 7

2. The adequacy of procedures for ensuring feedback and continuous improvement in the operation of the proposed project

Strengths:

The applicant includes language and activities under Objective 3 to evaluate the project and disseminate best practices and lessons learned in annual and periodic reports as part of continuous improvement efforts (p. e70-71).

Weaknesses:

It is unclear how the applicant will embed feedback and findings/recommendations from its report and data collection for continuous improvement.

Reader's Score: 2

3. The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project.

Sub

Strengths:

The applicant presents a fully developed management plan that allocates 1.0 FTE for a seasoned project manager for day-to-day operations of the grant and a 0.25 FTE for a grant auditor, in addition to an in-kind project director dedicated to this work (p. e72).

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. To meet this priority, the applicant must demonstrate that the State--

a. Allows at least one entity that is not a local educational agency (LEA) to be an authorized public chartering agency for developers seeking to open a charter school in the State ; or

b. In the case of a State in which LEAs are the only authorized public chartering agencies, the State has an appeals process for the denial of an application for a charter school.

Note: In order to meet this priority under paragraph (b) above, the entity hearing the appeal must have the authority to approve the charter application over the objections of the LEA.

Please specify whether they meet (a) or (b) and clearly explain why in the strengths.

(0 or 1 points)

Strengths:

At least one non-LEA authorizer exists in the state. The applicant meets option (a). The Idaho Public Charter School Commission authorizes the majority of the charters in the state (p. e20).

Weaknesses:

No weaknesses noted.

Reader's Score: 1

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that ensures equitable financing, as compared to traditional public schools, for charter schools and students in a prompt manner.

(up to 2 points)

Strengths:

The applicant has state laws and upholds these laws to provide equitable funding to charters as compared to traditional public schools. The state ensures charters access equitable funding under the same schedule and timeline, including in

areas of special education, alternative school support, and transportation costs. (p. e20-21)

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 3 - Competitive Preference Priority 3

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that uses best practices from charter schools to help improve struggling schools and LEAs.

(up to 2 points)

Strengths:

The applicant shares one example of best practice sharing where the state built a [REDACTED] CTE program around the successes of one of its charters, Elevate Academy, which is a career tech school for at-risk youth (p. e22).

Weaknesses:

It is unclear if the applicant has an established system of sharing best practices to improve struggling schools and LEAs. One example of best practice sharing is provided in the narrative, but it lacks details as to how the state shared these best practices. The example is vague and presents very limited information. (p. e22)

Reader's Score: 1

Competitive Preference Priority 4 - Competitive Preference Priority 4

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a State that provides charter schools one or more of the following:

- a) Funding for facilities
- b) Assistance with facilities acquisition
- c) Access to public facilities
- d) The ability to share in bonds or mill levies
- e) The right of first refusal to purchase public school buildings
- f) Low- or no-cost leasing privileges

(up to 2 points)

Strengths:

The state provides charter schools funding for facilities, including \$ [REDACTED] per student and an additional [REDACTED] per student from lottery proceeds (p. e22). Two new bills passed in 2023 will also afford charters lower interest bonds and loans in the future to aid them further in facilities financing (p. e23).

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 5 - Competitive Preference Priority 5

- 1. To be eligible to receive points under this priority, a State entity must demonstrate that it supports charter schools that serve at-risk students through activities such as dropout prevention, dropout recovery, or comprehensive career counseling services.**

(up to 3 points)

Strengths:

The applicant provides examples of 3 charter schools with specialized at-risk programs that it supports. The applicant provides the following examples: Elevate Academy, a career tech school for at-risk drop-out youth; Cardinal Academy, serving pregnant and parenting teens in partnership with Salvation Army; Promise Academy, an onsite charter partnering with Idaho Youth Ranch (a residential center for healing and resilience for trauma effected students (p. e23-24)

Weaknesses:

While the applicant presents evidence that all charter schools in the state serves at-risk students to a certain extent with recent legislation that favors at-risk students in the lottery systems, , there is no evidence beyond the 3 examples provided that programs specific to at-risk students exist and/or are supported in other charters. (p. e23-24)

Reader's Score: 2

Status: Submitted
Last Updated: 06/28/2023 10:26 AM

Status: Submitted

Last Updated: 06/29/2023 02:20 PM

Technical Review Coversheet

Applicant: Bluum, Inc. (S282A230005)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Selection Criteria		
Quality of Project Design		
1. Quality of Project Design	35	26
Quality of Eligible Applicants Receiving Subgrants		
1. Eligible Applicants	15	15
State Plan		
1. State Plan	35	23
Quality of the Management Plan		
1. Management Plan	15	9
Sub Total	100	73
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP1	1	1
Sub Total	1	1
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP2	2	2
Sub Total	2	2
Competitive Preference Priority 3		
Competitive Preference Priority 3		
1. CPP3	2	1
Sub Total	2	1
Competitive Preference Priority 4		
Competitive Preference Priority 4		
1. CPP4	2	2
Sub Total	2	2
Competitive Preference Priority 5		
Competitive Preference Priority 5		
1. CPP5	3	2
Sub Total	3	2

Total

110

81

Technical Review Form

Panel #14 - State Entities - 3: 84.282A

Reader #3: *****

Applicant: Bluum, Inc. (S282A230005)

Questions

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:

Reader's Score: 26

Sub

1. The extent to which the proposed project demonstrates a rationale;

Strengths:

The applicant clearly states the rationale as threefold: a. supply of school seats is tight, b. charter sector is well-established, capable of adding students and high-performing schools, and c. parent demand and public support are both robust. (pgs. 10-13). These three points are supported in the narrative with the Enrollment table on p. 12, Table 2, "NAEP Assessment Results" on p. 13, and Attachment 5, "Parent Feedback." The applicant clearly addresses the need to meet increasing enrollment throughout the state. The Table at the top of page 12 indicates charter school enrollment has almost doubled over the last ten years. The applicant asserts that this proposal will provide capacity to meet this growth. Table 2 on page 13 displays the academic achievement of 8th grade charter school students in Reading and Math. The applicant states, "... we seek to build upon the successes and momentum of Idaho's Communities of Excellence CSP grant 2018-23... we seek to continue expanding opportunities for students to attend excellent charter schools that meet and exceed state academic standards for all students." thus, citing an anticipated expectation of continued academic success for future schools included in this proposal. (pg. 3). Activities for strengthening the cohesive statewide strategy are generally outlined, the newly created K-12 task force through the Governor's office, the Bluum team will host an annual conference as well as provide technical assistance to the schools and potential authorizers, etc.

Weaknesses:

Specific strategies that answer how the applicant will turn around struggling schools is not addressed.

Reader's Score: 4

2. 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 and will produce quantitative and qualitative data to the extent possible; and

Strengths:

The applicant clearly states the quantitative performance measures aligned to each outcome: 1. Increased enrollment for each subgroup (Sped, economically disadvantaged, ELL) as measured annually by Idaho SDE data; 2. Supporting quality authorizers and dissemination of best authorizer practices as measured by student achievement data, graduation data as reported by Idaho SDE data, annual technical assistance/training for current and prospective authorizers; 3. Disseminate successes of high quality charter schools as measured by achievement

Sub

data for all student sub-groups as reported by ISAT scores. (pgs 17-19).

Weaknesses:

The applicant does not clearly state qualitative measures aligned to each project outcome. For example, Objective 3 states: Evaluate and disseminate widely the successes and lessons of high quality charter schools to impact the broader education systems. The performance measures aligned to this objective are only quantitative (achievement data provided by the Idaho Standard Achievement Test). (p.19).

Reader's Score: 3

3. The ambitiousness of the State entity's objectives for the quality charter school program carried out under the CSP State Entity program

Strengths:

The applicant clearly states the current costs of items necessary to carry out the plan have significantly increased to replicate the growth and success from the previous years. (p.20).

Also mentioned is Professional Development and Technical Assistance will be provided to new sub grantees as well as previously funded schools. The applicant provides a great deal of information such as team members and their roles providing support as well as the topics for Technical Assistance and Professional Development and partnering agencies to participate in providing both. (p. 22 & Attachment 9). Topics for Technical Assistance and Professional Development include: New Charter Petitioner Guidance, Pre-Opening Guidance, New School Leader Orientation, Charter Start 101, Strategic Budgeting, Board Development, Direct TA – Best Practices for Charter Schools (p.14 Attachment).

Weaknesses:

No weaknesses noted.

Reader's Score: 5

4. The extent to which the projected number of subgrant awards for each grant project year is supported by evidence of demand and need, and the extent to which the proposed average subgrant award amount is supported by evidence of the need of applicants

Strengths:

The applicant reports that despite the decline in student scores during the COVID-19 pandemic, based upon the information found in Table 2 (p. 13), the state's charter school students outperformed peers attending traditional school programs. The applicant shares the praises from the Stanford research team from CREDO regarding demonstrated achievement of students who are experiencing poverty and students with IEPs. The applicant specifically addresses the anticipation of continued growth among Hispanic students and provides supporting information from the Idaho Commission on Hispanic Affairs (p.23). Overall, the applicant provides context to support the demand and need to obtain new school capacity for charter school students. (p.23). The applicant states a forecast of 13 subgrant awards per project year with a mixture of (10) startup K-12/CTE schools, and (3) smaller rural/expansion schools (Table 5; p.25-26).

Weaknesses:

The applicant provides general methodology regarding the determination of subgrants. (Table 5; p. 25) but no evidence of specific data or variables that informed the decision to fund 13 subgrant awards.

Sub

Reader's Score: 14

Selection Criteria - Quality of Eligible Applicants Receiving Subgrants

1. The likelihood that the eligible applicants receiving subgrants under the program will meet the State entity's objectives for the quality charter school program and improve education results for students.

Strengths:

The applicant explains in great detail the process to: promote the request for proposals, share information with potential sub grantees, recruit and training peer reviewers, capacity interview, budget narrative and allowable costs, management and financial budget review and ensuring that a transportation plan for students and activities for engaging families and the communities is present in the submitted proposals (timeline of related activities – p. 30).

Weaknesses:

No weaknesses noted.

Reader's Score: 15

Selection Criteria - State Plan

1. The State entity's plan to--

Reader's Score: 23

Sub

1. Adequately monitor the eligible applicants receiving subgrants under the State entity's program;

Strengths:

The applicant shares that a qualified team of professionals conducts the tasks that comprise the monitoring plan. (p. 39). The resumes and backgrounds of the designated key personnel substantiates their qualifications. (Table 12 – pgs. 59-60). A monitoring timeline and table of monitoring type activities is also provided. (p.40). The applicant shares that the monitoring tasks will be supplemented by the work conducted by the state approved charter school authorizers. (p.39).

The CSP Playbook, (Attachment 11), outlines the entire CSP application process for subgrantees. Credibility of school financial plans will be monitored monthly through targeted financial reviews. (p.41). The applicant outlines Seven-key indicators for school effectiveness: 1. Meeting/Exceeding state academic achievement and growth targets in 4th-8th grades ELA and Math; 2. 85% of graduates seeking employment, post-secondary education, etc.; 3. The extent that the school meeting/exceeding enrollment targets; 4. Consideration of existing audit violations; 5. Changes in school leadership or governing board membership; 6. Consideration of standing ratings from the authorizer; and 7. Examining the retention rate data for students and staff. (Pgs. 42-43).

Weaknesses:

The applicant states, "we will engage in a range of thorough and differentiated monitoring activities to ensure that all grantees are implementing with fidelity the activities described in their grant applications..." (p.39). There appears to be no clear evidence of: the details of those activities, "how" designated monitors are trained for their roles, and a

Sub

process to evaluate the sub grantees plans for sustainability. While a monitoring timeline and table of monitoring type activities is provided, the timelines represents only the first year of funding. (p.40).

Reader's Score: 7

2. Work with the authorized public chartering agencies involved to avoid duplication of work for the charter schools and authorized public chartering agencies;

Strengths:

The applicant provided the state guidelines regarding charter flexibilities. (pgs. 43-44).

The applicant states that the Idaho Public Charter School Commission has lead the way in trying to develop rigorous application, pre-opening, monitoring, evaluating and renewal processes for their authorized schools. (p.44). However, at this time the IPCSC is still in need of support provided by the applicant in the areas of technical assistance resources. (p.44).

Weaknesses:

The applicant does not clearly provide evidence of a detailed plan or memorandum of understanding regarding strategies to delineate what is provided and by which agency thus preventing the duplication of work.

Reader's Score: 3

3. Provide technical assistance and support for--

- i. The eligible applicants receiving subgrants under the State entity's program; and**
- ii. Quality authorizing efforts in the State;**

Strengths:

The applicant states that an on-site visit will occur within the first 12-months of the grant funding implementation. (p. 43). A list of the technical supports provided include: Financial processes (forecasting, monthly transactions, strategic planning, audit preparation), Facilities (planning and finances for future campuses), Special Education, Academics (coaching, on-site visits, professional development) (pgs. 45-47). Previous CSP Project Technical Assistance included: New Charter Petitioner Guidance, Pre-Opening Guidance, New School Leader Orientation, Charter Start 101, Strategic Budgeting, Board Development, Direct TA – Best Practices for Charter Schools (p.14 Attachment).

Weaknesses:

The applicant does not provide evidence of activities to help sub grantees with student recruitment, enrollment, student retention, reducing discipline, etc. The applicant states that technical assistance plans will not be developed prior to the review of the risk assessment analysis. There is no evidence that a structured plan is already in place to provide consistent content for all schools yet room to tailor specific content to meet the individual needs of each school based upon the risk assessment analysis feedback. (Attachment 11 – p.19). The information appears to be quite general without specific alignment to the needs of the potential subgrant recipients. For example, there is no clear evidence of technical assistance aligned to educating at-risk students.

Sub

Reader's Score: 7

4. **The State entity's plan to solicit and consider input from parents and other members of the community on the implementation and operation of charter schools in the State; and**

Strengths:

The applicant refers to "knowledge discrepancy" and states that it is their responsibility to proactively reach out to families in the community intermediaries, churches, place of employment, cultural organizations and social media. (p. 51).

Weaknesses:

The applicant lacks a timeline indicating how the strategies will be delivered to families, methods to collect information and a detailed plan of how the information will be applied. (p.49-52)

Reader's Score: 3

5. **The degree of flexibility afforded by the State's charter school law and how the State entity will work to maximize the flexibility provided to charter schools under such law.**

Strengths:

The applicant provides the specific state guidelines that allow for discretion in decision-making related to operations and logistics for maintaining well-run schools. Flexibility areas cited include: charters are allowed to be categorized as its own LEA, charter schools may borrow money to finance building facilities, a non-charter entity may hold multiple charters, a variety of charter authorizers is allowed, charter school teachers participate in the Idaho state retirement system, charter schools may contract with charter management organizations and charter schools can certify their own administrators and teachers (pgs. 52-53).

Weaknesses:

The applicant does not provide clear evidence of a specific plan responding "how" they will maximize flexibility.

Reader's Score: 3

Selection Criteria - Quality of the Management Plan

1. **The Secretary considers the quality of the management plan for the proposed project. In determining the quality of the management plan for the proposed project, the Secretary considers:**

Reader's Score: 9

Sub

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 Management Plan includes: external partners, and strategies to meet objectives, outputs and outcomes. (Table 12, pgs. 59-60). The personnel included have appropriate qualifications for each identified roles. For example, the

Sub

information provided for the Project Director, Director of Federal Grants, Chief Financial Officer, Chief Academic Program Officer, Special Education Director and Director of School Strategy and Operations includes relevant experience and qualifications that are aligned to each role outlined for this project. (pgs. 59-60). The applicant cites adequate resources to support the tasks outlined in the management plan in the areas of fiscal support, programmatic support, technical assistance and overall project management. (p. 54). The strategies to meet the objectives indicate alignment with the project outputs and outcomes: for example, the subgrantee survey data regarding external supports is provided to the funding agency to evaluate challenges/successes that may influence the project outcomes aligned to increasing the number of high quality charter school seats. (p.56).

Weaknesses:

The applicant does not provide clear evidence of the timeline and milestones for the Management Plan. (pgs. 56-57). It is unclear which of the key personnel will be performing/overseeing the tasks outlined in the management plan.

Reader's Score: 5

2. The adequacy of procedures for ensuring feedback and continuous improvement in the operation of the proposed project

Strengths:

The applicant provides evidence of the following strategies to elicit feedback: frequent on-site monitoring (p.56), consistent on-site monitoring (p.56), annual training for participants to both share feedback and gain best practices from peers regarding various academic and non-academic program areas (p.56), applicant surveys regarding technical assistance support (p.56), qualitative and quantitative data collection (p.57), subgrantee data summary including both academic and non-academic data sources shared with subgrantees via the final project report (p.57), summary of data related to family and community engagement (p.57), and subgrantee participation in decision-making aligned to project objectives (p.57).

Weaknesses:

The applicant does not provide clear evidence of a plan that states "how" they will collect, analyze and use feedback to improve the proposed project.

Reader's Score: 2

3. The extent to which the time commitments of the project director and principal investigator and other key project personnel are appropriate and adequate to meet the objectives of the proposed project.

Strengths:

The applicant has provided sufficient evidence substantiating the qualifications for the key personnel to provide significant support for the proposed project in the prospective roles. The personnel included have appropriate qualifications for each identified roles. For example, the information provided for the Project Director, Director of Federal Grants, Chief Financial Officer, Chief Academic Program Officer, Special Education Director and Director of School Strategy and Operations includes relevant experience and qualifications that are aligned to each role outlined for this project. (pgs. 59-60). The applicant cites adequate resources to support the tasks outlined in the management plan in the areas of fiscal support, programmatic support, technical assistance and overall project management. (p. 54).

Sub

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. To meet this priority, the applicant must demonstrate that the State--

a. Allows at least one entity that is not a local educational agency (LEA) to be an authorized public chartering agency for developers seeking to open a charter school in the State ; or

b. In the case of a State in which LEAs are the only authorized public chartering agencies, the State has an appeals process for the denial of an application for a charter school.

Note: In order to meet this priority under paragraph (b) above, the entity hearing the appeal must have the authority to approve the charter application over the objections of the LEA.

Please specify whether they meet (a) or (b) and clearly explain why in the strengths.

(0 or 1 points)

Strengths:

The applicant identifies (a) the Idaho Public Charter School Commission as the non-LEA public chartering agency.

Weaknesses:

No weaknesses noted.

Reader's Score: 1

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that ensures equitable financing, as compared to traditional public schools, for charter schools and students in a prompt manner.

(up to 2 points)

Strengths:

The applicant describes the equitable financing as follows: Idaho charter schools receive equal access to state funds (p. 6), public charter schools are funded on the same payments schedule as all public schools across the state (p.6), all state and federal funds allocated for students receiving special education services remains with the students when enrolled in a charter school (p.7), alternative schools may qualify for state funds (p.7) and charter schools receive the same allocation for transporting students as all other public LEAs.

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 3 - Competitive Preference Priority 3

1. **To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a state that uses best practices from charter schools to help improve struggling schools and LEAs.**

(up to 2 points)

Strengths:

The applicant states that these particular schools who have received CSP funding previously "improve learning opportunities for struggling students." (p.7). Schools include: Elevate Academy East, RISE Charter School and the Career Tech Elevate Academy campuses. Each provides learning opportunities for students with low GPA, high absenteeism, serious medical or personal issues, and involvement with the judicial system, a pregnant youth or student who is a parent. The applicant provides technical assistance for schools that are failing benchmarks (p.43).

Weaknesses:

The applicant does not provide detail regarding the specific best practices applied to improve the struggling schools and LEAs.

Reader's Score: 1

Competitive Preference Priority 4 - Competitive Preference Priority 4

1. **To be eligible to receive points under this priority, a State entity must demonstrate that it is located in a State that provides charter schools one or more of the following:**

- a) **Funding for facilities**
- b) **Assistance with facilities acquisition**
- c) **Access to public facilities**
- d) **The ability to share in bonds or mill levies**
- e) **The right of first refusal to purchase public school buildings**
- f) **Low- or no-cost leasing privileges**

(up to 2 points)

Strengths:

The applicant cites the following in support of the priority for facilities: State legislation provides a per pupil allowance that is calculated at approximately [REDACTED] of what the traditional school districts receive annually. The state also contributes a fixed amount of [REDACTED]/student from state lottery funds. Recent legislation (S1042) provides established charter schools with lower interest rates on bonds and (S1043) created a [REDACTED] dollar revolving loan to help new charter schools obtain lower interest rates on loans. (pgs. 8-9).

Weaknesses:

No weaknesses noted.

Reader's Score: 2

Competitive Preference Priority 5 - Competitive Preference Priority 5

1. To be eligible to receive points under this priority, a State entity must demonstrate that it supports charter schools that serve at-risk students through activities such as dropout prevention, dropout recovery, or comprehensive career counseling services.

(up to 3 points)

Strengths:

The applicant shares that the previously funded CSP grantees included charter schools that enroll and deliver instruction for at-risk and rural students. Examples of previous strategies include: buses to eliminate transportation barriers for students and kitchen equipment to increase capacity for more eligible students to receive free/reduced meals on the first day of school. (p.9). Moreover, the applicant includes the following previous grantees and their focus areas for at-risk students: Elevate Charter Schools, designed to provide career technical education for students as an option for dropping out of school; Cardinal Academy serving pregnant and parenting teens; Idaho Ranch Residential Center serving students whose lives have been affected by traumatic events. (p.10).

Weaknesses:

The applicant does not provide evidence of a sustainable plan to ensure equitable access to the supports that the applicant indicated as examples of supports that have been provided previously including assistance with transportation for students and increasing capacity to provide free/reduced meals for more students. (p.10).

Reader's Score: 2

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