

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

# Technical Review Form

Panel #1 - OSP 2015 - 1: 84.370A

Reader #1: \*\*\*\*\*

Applicant: Serving Our Children (U370A150001)

## Questions

### Selection Criteria - Quality of Project Services

#### 1. A. Quality of project services (20 points).

- (1) The Secretary considers the quality of the services to be provided by the proposed project.
- (2) In determining the quality of the services to be provided by the proposed project, the Secretary considers the quality and sufficiency of strategies for ensuring equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.
- (3) In addition, the Secretary considers the extent to which the services to be provided by the proposed project are appropriate to the needs of the intended recipients or beneficiaries of those services.

#### Strengths:

- p. 4-5 The applicant has done its background homework and read the GAO report as noted by the references to specific deficiencies raised in the report.
- p. 5 The applicant notes that automating the application process will make it easier for families to apply as well as free up staff time to conduct more robust outreach and improve quality and compliance issues.
- p. 6 On the top of page 6, the applicant summarizes the activities – technology upgrades and development of policies and procedures – both of which are critical levers for program improvement.
- p. 12-13 The applicant has identified strategies to reach eligible participants (e.g., link to SNAP eligibility) and to streamline the application process (e.g., upload proof of income) to increase the application completion rate.

#### Weaknesses:

- p. 4-6 The quality of the services section does not include a comprehensive overview of the services to be provided, but rather the text is limited to several problems raised by the GAO report and proposed “fixes.” The proposal would be stronger if there was equal attention paid to services related to parent engagement.

Reader's Score: 18

### Selection Criteria - Quality of Project Personnel

#### 1. B. Quality of project personnel (25 points).

- (1) The Secretary considers the quality of the personnel who will carry out the proposed project.
- (2) In determining the quality of project personnel, the Secretary considers 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.
- (3) In addition, the Secretary considers:
  - (i) The qualifications, including relevant training and experience, of the project director or principal investigator.
  - (ii) The qualifications, including relevant training and experience, of key project personnel.

**Strengths:**

- p. 6 The applicant notes a current relationship with the Trust, the current grantee, which should facilitate a smooth transition.
- p. 6 The applicant recognizes that the demographics of the outreach staff should reflect the target population and states intent to hire staff from underrepresented groups.
- p. 7 The executive director and consultant have extensive relevant experience and knowledge of the program.
- p. 8-9 The board members have extensive relevant experience, strong local education landscape knowledge, knowledge of the OSP in particular, and are from underrepresented groups.
- p. 8 The FTE allocations reflect appropriate distribution of staff.
- p. 10-11 The applicant demonstrates knowledge of similar programs in other jurisdictions that SOC can call on for advice.

**Weaknesses:**

- p. 8 There is not detailed staff capability presented on the parent engagement aspect of the work. For positions not filled where a resume cannot be provided, it would be helpful to see a position description.
- p. 10 The qualifications of 270 Strategies were not provided and the outreach component is a critical piece of the work. It's not clear what their past experience is.

**Reader's Score: 23**

**Selection Criteria - Adequacy of Resources****1. C. Adequacy of resources (20 points).**

- (1) The Secretary considers the adequacy of resources for the proposed project.
- (2) In determining the adequacy of resources for the proposed project, the Secretary considers:
  - (i) The adequacy of support, including facilities, equipment, supplies, and other resources, from the applicant organization or the lead applicant organization.
  - (ii) The extent to which the budget is adequate to support the proposed project.

**Strengths:**

- p. 11 The applicant has secured a \$500k grant that will be used for startup and technology upgrades. This validates funder confidence in the applicant.
- p. 10, 12 The applicant already has an IT vendor and plan in place, but is also open to other vendors, that can assist with adopting the SchoolForce system and making other IT upgrades.
- The applicant describes throughout the proposal services and activities that demonstrate a clear and realistic understanding of the necessary resources to implement and oversee the OSP.
- The staffing plan for OSP management is solid.
- The applicant presents a realistic and detailed budget narrative.

**Weaknesses:**

- p. 11 The applicant does not elaborate on other resources and supports – facilities, equipment, supplies, etc. It is not clear what is already in place versus what will be built from scratch and how much of a ramping up period will be needed before work can get underway.
- p. 18 The applicant states that Spanish language materials will be created but the proposal would be stronger if there were a plan in place to produce materials in the other top languages present in DC schools (French, Vietnamese, Chinese, Amharic).

## Selection Criteria - Quality of the Management Plan

### 1. D. Quality of the management plan (35 points).

(1) The Secretary considers the quality of the management plan for the proposed project.

(2) In determining the quality of the management plan for the proposed project, the Secretary considers:

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

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

(iii) The adequacy of mechanisms for ensuring high-quality products and services from the proposed project.

#### Strengths:

p. 8 The staffing plan (number of FTEs and identified positions) is clear and appropriate to carry out the activities in the management plan.

p. 12-14 The bulleted list on these pages explicitly details the IT strategies to streamline the application process and improve application completion rates by families.

p. 15-18 Good detail is provided on the school oversight activities (e.g., publishing a manual, holding webinars, site visit procedures).

p. 24-25 The applicant details specific actions focusing on financial management and data reporting and who will be responsible.

p. 28 The outreach plan is comprehensive and explicit (e.g., social media, direct mail, media ads, meetings, call center) and demonstrates knowledge of the local landscape and existing activities to piggyback on (e.g., My School DC).

#### Weaknesses:

p. 14 The timeline for standing up the IT solutions is referenced but there is no explicit start date and no overall project timeline. No indication of when new hires come on board or when recruitment/re-enrollment activities begin.

p. 25 While it is clear that the applicant has thought through timelines from the details in other sections, more specific dates/date ranges are needed here. The applicant provides only vague references:

"12 weeks to develop"

"initial 3-month period"

"will immediately start the process"

"annually survey families"

p. 27 The lottery is not clear; more detail is needed to fully understand the proposed process.

# Technical Review Form

Panel #1 - OSP 2015 - 1: 84.370A

Reader #2: \*\*\*\*\*

Applicant: Serving Our Children (U370A150001)

## Questions

### Selection Criteria - Quality of Project Services

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- (2) In determining the quality of the services to be provided by the proposed project, the Secretary considers the quality and sufficiency of strategies for ensuring equal access and treatment for eligible project participants who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.
- (3) In addition, the Secretary considers the extent to which the services to be provided by the proposed project are appropriate to the needs of the intended recipients or beneficiaries of those services.

#### Strengths:

The emphasis in the proposal on technology upgrades to "facilitate improved oversight, accurate data collection, and effective management of the program," is a significant strength of this proposal. As noted in the proposal, the GAO has criticized the current program administrator for failing to implement effective systems to collect and manage data, and supervise participating schools. This applicant is proposing to address this shortcoming through the use of upgraded and improved technology. A sophisticated program management system will simplify, streamline, and automate application, eligibility and scholarship award processes, and free up man hours and allow staff greater opportunity to focus on reaching out to all the affected stakeholders of the program, and on improving the program's quality and compliance policies

#### Weaknesses:

There is a lack of detail and specificity on how the applicant will address "greater community awareness and support," improving relationships with targeted beneficiaries, and on outreach to the community. Even though there is a long list of strategies for improving community outreach and eligible applicant recruitment in the Narrative, the proposal is short on details, and on the relevant experience to support these strategies.

Reader's Score: 17

### Selection Criteria - Quality of Project Personnel

#### 1. B. Quality of project personnel (25 points).

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- (3) In addition, the Secretary considers:
  - (i) The qualifications, including relevant training and experience, of the project director or principal investigator.
  - (ii) The qualifications, including relevant training and experience, of key project personnel.

#### Strengths:

The proposal contains important emphasis on high-level, dedicated professional leadership, with strong backgrounds with the existing OSP program. There is strong experience working with school choice programs and relevant data management systems. There is a very well-rounded leadership team and high-level Board of Directors. Technology

support is a major part of the proposal. There is an OSP parent on the Board, which is a significant strength.

**Weaknesses:**

There is a notable lack of community-based experience and working knowledge of the target population. There is no senior staff with strong experience in the community.

**Reader's Score: 23**

**Selection Criteria - Adequacy of Resources**

**1. C. Adequacy of resources (20 points).**

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  - (ii) The extent to which the budget is adequate to support the proposed project.**

**Strengths:**

The allocation of resources in the Budget Narrative reflects a commitment to robust senior staffing. The outside commitment of \$500,000 mentioned on pages 10 and 11 of the proposal is a significant strength. Using \$300,000 of these outside funds to upgrade technology data and processing systems is a significant positive. Overall, in terms of the adequacy of resources to administer the OSP, this is an excellent proposal.

**Weaknesses:**

There is a notable lack of individualized student and family support in the proposal. There are no details on resources allocated to providing oversight and troubleshooting at the schools.

**Reader's Score: 19**

**Selection Criteria - Quality of the Management Plan**

**1. D. Quality of the management plan (35 points).**

- (1) The Secretary considers the quality of the management plan for the proposed project.**
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  - (ii) The adequacy of procedures for ensuring feedback and continuous improvement in the operation of the proposed project.**
  - (iii) The adequacy of mechanisms for ensuring high-quality products and services from the proposed project.**

**Strengths:**

The proposal's emphasis on streamlining the application process is very positive. Its emphasis on technology upgrades through a proposed relationship with Acumen Solutions, to deploy School Force, is also a significant strength. According to the application, the new technology system will allow the applicant to link with other governmental databases for automated income eligibility determinations based on the receipt of other government benefits. This automation will reduce staff resources needed for eligibility determinations, and free those resources up for better outreach and other coordinating activities. The automated system will allow the OSP administrator to gather enrollment information from DCPS; help applicants easily upload proof of income and residency eligibility; allow schools to monitor participating families' program renewal status; encourage parents to create or use an existing email account; and many produce many other efficiencies. Importantly, as the proposal points out, "implementing a sophisticated, highly automated system will

enable staff to allocate more time to school oversight and parental outreach and support. The proposal's emphasis on school oversight – its detailed commitment to webinars, informational outreach, and school visits – is a significant strength. The proposal's emphasis on prioritizing outreach and recruitment efforts in schools in need of improvement in the District of Columbia is also a significant strength.

**Weaknesses:**

The proposal contains no timeline, other than the initial 3-month period, for achieving key milestones. The Management Plan does not break down specific responsibilities among senior program officers. And there is no provision made for families who lack access to technology - there is a lack of parent advocacy provided for in the proposal. Finally, there are no individualized student support services, such as tutoring services, provided for in the proposal.

**Reader's Score: 30**

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# Technical Review Form

Panel #1 - OSP 2015 - 1: 84.370A

Reader #3: \*\*\*\*\*

Applicant: Serving Our Children (U370A150001)

## Questions

### Selection Criteria - Quality of Project Services

#### 1. A. Quality of project services (20 points).

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- (3) In addition, the Secretary considers the extent to which the services to be provided by the proposed project are appropriate to the needs of the intended recipients or beneficiaries of those services.

#### Strengths:

Serving Our Children is dedicated to serving the specific grant population and appears to have developed a detailed marketing and outreach plan to do so. Their existing relationships with local organizations and experience with low-income parents strengthen this area of their proposal. Past experience in other states shows that their approach to events, detailed database tracking, online and cell phone access to applications will dramatically increase the quality and accessibility of the program to eligible students.

#### Weaknesses:

Serving Our Children's network of school-related organizations, religious and non-religious organizations that have an education focus and education-related organizations appear to be limited. The application lacks a broader scope of reach among these entities which would lead to a much higher quality experience for applicants and much greater access to the communities served by the program. In order to reach the most eligible families, the organization will need access to these families through all types of entities: churches, existing schools, community groups, parent organizations, service organizations (which were sparsely mentioned in the application on page 34) and the like. While the project services plan seems excellent, there is a lack of detail on how they will execute these items.

Reader's Score: 19

### Selection Criteria - Quality of Project Personnel

#### 1. B. Quality of project personnel (25 points).

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  - (i) The qualifications, including relevant training and experience, of the project director or principal investigator.
  - (ii) The qualifications, including relevant training and experience, of key project personnel.

#### Strengths:

Key personnel for this organization have extensive experience in organizational management, administration of similar programs, and education reform research and efforts. The personnel and board represent a diverse range of experiences in these areas, as well as direct involvement in DC education and reform. Resumes provided show a broad

understanding of scholarship programs, school choice options across areas (charter, public, private), and direct implementation of programs and reporting systems for education programs. The leadership team for Serving Our Children shows a strong background in all the areas required to plan and manage this program.

**Weaknesses:**

The application included most of the management positions but not key project personnel who would implement the marketing and outreach programs directly.

**Reader's Score:** 23

**Selection Criteria - Adequacy of Resources**

**1. C. Adequacy of resources (20 points).**

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**Strengths:**

The organization has access to additional and outside funding for outreach and technology efforts that will bolster administration of the grant implementation as well as the other areas of support they will provide. As seen in other scholarship program efforts around the country, this additional outside support will provide a significant advantage to the program and the likelihood of success of their efforts. The organization also has already sought out quotes and service providers for many (if not all) of the outside vendors they will need to execute the grant - so they are ready to proceed with the work if awarded. Through their existing board and connections, this organization also has access to multiple other sources of income if needed to support outreach work.

**Weaknesses:**

The estimate of technology costs and time to implement seemed excessive, far beyond costs and quotes I have seen for other states and third party technologies used by scholarship organizations. The long lead time for development of the software could hamper their implementation efforts.

**Reader's Score:** 17

**Selection Criteria - Quality of the Management Plan**

**1. D. Quality of the management plan (35 points).**

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  - (iii) The adequacy of mechanisms for ensuring high-quality products and services from the proposed project.**

**Strengths:**

The organization's management plan - on a high level - is excellent and detailed. It clearly explains the process for securing applications, managing data, forming and keeping relationships with key partners, funding, and reporting. Their plan is also strong in providing specifics for who will be responsible for managing and ensuring each segment's goals are

achieved. This plan also takes note of weaknesses in previous organization's administration of the program and how they will avoid/resolve those issues going forward. The technology upgrades especially will dramatically increase numbers of families with access to the information, and likely numbers served in the program. The outreach and oversight plan for schools is also very detailed and will strengthen the options and quality of education for families in the program.

**Weaknesses:**

While the proposal provides a clear "who," "what," and "how" for the larger goals of the grant and program, it did not provide a detailed timeline or detailed milestones for implementation of these tasks. The broad goals and methods - in pages 34-37 - are well defined, but there is very little information on when these items will be done, who will be responsible for each task, and how they will measure their success on these items. For example, on page 35-36, they have well-defined their organization's overhaul of the application process, explained new and multiple methods parents will be able to use, and how they will change the deadlines. But, the proposal does not mention monthly milestones, dates, and who will be primarily responsible. This is consistent throughout each area of the proposal. More detail would have assisted in understanding how the goals would be met.

**Reader's Score:**     **28**

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