

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

Status: Submitted

Last Updated: 08/20/2013 06:40 PM

Technical Review Coversheet

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Reader #1: *****

	Points Possible	Points Scored
Questions		
Summary Statement		
Summary Statement		
1. Summary Statement	0	0
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	20	20
Quality of the Management Plan		
1. Management Plan	20	20
Quality of Project Personnel		
1. Personnel	10	8
Quality of the Project Evaluation		
1. Project Evaluation	30	0
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP 1	1	0
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP 2	2	2
Invitational Priority		
Invitational Priority		
1. Invitational Priority	0	0
Total	103	70

Technical Review Form

Panel #2 - i3 Validation - 2: 84.411B

Reader #1: *****

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Questions

Summary Statement - Summary Statement

1. Summary Statement (Optional):

General:

NA

Reader's Score: 0

Selection Criteria - Significance

1. In determining the significance of the project, the Secretary considers the following factors:

(1) The likelihood that the project will have the estimated impact, including the extent to which the applicant demonstrates that unmet demand for the proposed project or the proposed services will enable the applicant to reach the proposed level of scale.

(2) The feasibility of national expansion if favorable outcomes are achieved.

Strengths:

The goals of the proposed project are to increase instructional effectiveness of novice teachers, achievement of students of participating teachers, and retention of novice teachers (p. e15).

As the applicant correctly notes, many teachers are under-prepared to teach to the level of rigor required by the Common Core, and the proposed project addresses an unmet need for an "effective means of supporting novice teachers in the development of their professional capacity to deliver much higher rates of proficiency for high-need students, particularly in the context of the implementation of the Common Core State Standards" (p. e20).

To achieve these goals, the applicant seeks to engage two cohorts of 30 schools in a two year intervention which will directly impact almost 50,000 students in the three states.

The proposed project intends to build on previous efforts using an evidence-based model which has been found to demonstrate statistically significant results that meet What Works Clearinghouse standards. For example, a study by Mathematica indicates that in schools where the EL model has been used "student achievement exceeded district averages, often by substantial margins" (p. e22). Using a "months of learning" approach (p. e22), academic growth of students was realized in reading and math. Additionally, the results suggest a strong linkage between the EL model and teacher capacity. Given these findings, and the fact that EL currently includes "165 schools, 4,000 teachers and 45,000 students in 30 states" (p. e22), the proposed project has strong feasibility for national expansion

It is also significant that EL currently serves large numbers of minority, English language learner and special needs students—students who often struggle with academics, are below grade level and who bring a variety of external challenges to the classroom environment.

The proposed project will use a 36 model curriculum with 160 days of lesson plans in addition to various types of assessments that would support novice teachers--also a significant factor in making the proposed project feasible for national expansion.

A major focus of the proposed project is to increase novice teachers' capacity for effective instruction. Thus, the proposed

use of the Expeditionary Learning curriculum that is aligned with the Common Core Standards assures that novice teachers will be well prepared to provide students with rigorous, high-quality instruction required by the Common Core Standards. Further, the alignment of EL and CCS includes a blended support model (p. e15) that includes on-site coaching, online resources, and off-site institutes. The combination of these activities—both theory based and experiential—assures that teachers, and especially novice teachers, can experience professional and personal growth as their work leads to higher levels of student achievement. Through theory based and experiential learning and activities, teachers understand the “what” (an EL model created by teachers) and the “how”(professional learning to build the capacity of novice teachers) of Common Core Standards thereby using a systematic, long term approach to instructional excellence and student achievement.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weaknesses.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

- (1) The extent to which the proposed project addresses the national need and priorities the applicant is seeking to meet.**
- (2) The extent to which the proposed project has a clear set of goals and an explicit plan or actions to achieve the goals, including identification of any elements of the project logic model that require further testing or development.**
- (3) The extent to which the applicant will use grant funds to address a particular barrier or barriers that prevented the applicant, in the past, from reaching the level of scale proposed in the application.**

Strengths:

The proposed project addresses Absolute Priority I by partnering with high-need districts in three states to "replicate, scale and validate its model of professional development for novice teachers" (p. e15).

The project is well designed and will be based on six well-articulated characteristics on high-quality professional learning (p. e30): alignment of shared goals; structured comprehensive professional learning; opportunities to learn from experienced teachers; sustained on and off-site coaching and support; collaborations with new and experienced teachers; and, connections to the broader culture of professional learning. For example, to address the characteristic of comprehensive professional development, teachers will participate in an intensive two year program where they will focus on “pedagogical knowledge and content knowledge” (p. e30), activities that reinforce the “what” and the “how” of the Common Core Standards.

Additionally, the proposed project includes a measurable set of goals and objectives (p. e31) that are consistent with the characteristics of high-quality professional learning: increasing student achievement, increasing the effectiveness of novice teachers’ implementation of the EL Core Practices, and retaining effective participating teachers by the end of the grant period. For example, the applicant posits that the ratings of novice teachers’ classroom practices will increase and will exceed those of the control group (p. e31). This goal appears to be consistent with the characteristics of high quality professional learning, particularly with respect to sustained on and off-site support. The goals and objectives are well aligned with the characteristics of high-quality professional learning.

The proposed project also identifies strategies to achieve goals which include an EL language arts curriculum, master

practitioner books and videos, leadership support, professional learning institutes, coaching and online learning networks (p. e33-34). The strategies are intended to use a literacy curriculum as the common course of study for two cohorts of 30 schools. The strategies continue to reinforce the purpose of the proposed project and will provide a systematic, consistent series of activities that promote high-quality learning, reflection and teacher capacity, leading to higher levels of student achievement.

The proposed project will address four internal barriers that limit the ability to meet the growing demand for Common Core aligned professional development for novice teachers (p. e35): validation of the results; increased functionality of the online platform; comprehensive K-8 literacy curriculum; and, hiring and training more staff. The applicant intends to address these barriers through a variety of avenues which include an external evaluation, online learning platform, development of a literacy curriculum and expanding and training EL staff. For example, to address the barrier of a comprehensive K-8 literacy curriculum, the applicant will use grant funds to complete a writing curriculum which will be used with a curriculum model already in use in grades 3-8. As the curriculum is a key component of the proposed project (alignment of EL curriculum with Common Core), the addition of a complete literacy curriculum will provide additional support for teachers, allowing them to gain both pedagogical and content knowledge, which should lead to increased student outcomes.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weaknesses.

Reader's Score: 20

Selection Criteria - Quality of the Management Plan

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

(1) The extent to which the management plan articulates key responsibilities and well-defined objectives, including the timelines and milestones for completion of major project activities, the metrics that will be used to assess progress on an ongoing basis, and annual performance targets the applicant will use to monitor whether the project is achieving its goals.

(2) The clarity and coherence of the applicant's multi-year financial and operating model and accompanying plan to operate the project at a national or regional (as defined in the Validation Notice Inviting Applications) during the project period.

Strengths:

The proposed project articulates the expertise and responsibilities of the management team. For example, the Project Director will provide guidance and oversight of the entire project (implementation of the project; monitoring the progress of meeting the program objectives, assessing performance targets). The Project Director will also work with the Senior Leadership Team to ensure that the resources are being used according to their intended purpose and will be in frequent communication with the participating LEAs. The management team also includes a Research Team that will perform annual reviews, collect monitoring data to assess if and when adjustment should/need to be made and will serve as the liaison to the external evaluation team. An i3 Grant Oversight Team will provide financial and management oversight to ensure that the project is being managed with fidelity.

The management team will also engage in the process of assessing how well the project is meeting its intended goals of raising the ratings of novice teachers, improving the test scores of students in EL schools, and retaining participating novice teachers. The metrics and annual performance targets are detailed on p. e38-40 and are also consistent with the intended measurable outcomes noted above.

Timelines and milestones are well articulated within the performance target (p. e38-40). For example, for each metric, the yearly performance target is given. Additionally, the tasks and the individuals responsible for completing the tasks, and

the year in which the tasks will be completed are detailed on p. e39-40. It is clear that the timeline and milestones are aligned with the characteristics of high-quality learning as well as the goals and objectives. The management plan (personnel, timelines, milestones) should be effective in reaching the desired outcomes of the proposed project. Additionally, given that applicant has a long history of success, the management plan is consistent with its previous efforts.

The financial model and strategy for sustainability are clearly explained and are consistent with the needs of the proposed project.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weaknesses.

Reader's Score: 20

Selection Criteria - Quality of Project Personnel

1. In determining the quality and personnel for the proposed project, the Secretary considers the following factor:

(1) The adequacy of the project's staffing plan, particularly for the first year of the project, including the identification of the project director and, in the case of projects with unfilled key personnel positions at the beginning of the project, that the staffing plan identifies how critical work will proceed.

(2) The qualifications and experience of the project director and other key project personnel and the extent to which they have the expertise to accomplish the proposed tasks.

Strengths:

The collective expertise of the personnel aligns with/is necessary for successful implementation of the project. The proposed management team has previous experience with EL, coaching, strategic planning, professional learning, curriculum development, technology and research and evaluation. For example, the Project Director who is a key figure in the implementation and management of the propose project has served as the Chief Financial Officer of EL, has been a senior administrator in the nation's largest school district, and has an extensive background in school finance. Other personnel who are critical to the success operation of the project have collective expertise in areas such as training coach, classroom teaching, Race to the Top, district-wide technology initiatives).

Weaknesses:

The project director is identified. However, there is no discussion of the adequacy of the staffing plan for the first year. Additionally, other than the Project Director, it was not clear which individual would assume which position on the management team.

Reader's Score: 8

Selection Criteria - Quality of the Project Evaluation

1. In determining the quality of the project evaluation to be conducted, the Secretary considers the following factors:

(1) The clarity and importance of the key questions to be addressed by the project evaluation, and the appropriateness of the methods for how each question will be addressed.

(2) 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 Evidence Standards without reservations.

(3) The extent to which the evaluation will study the project at the proposed level of scale, including, where appropriate, generating information about potential differential effectiveness of the project in diverse settings and for diverse student population groups.

(4) The extent to which the evaluation plan includes a clear and credible analysis plan, including a proposed sample size and minimum detectable effect size that aligns with the expected project impact, and an analytic approach for addressing the research questions.

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

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. Under this priority, we provide funding to projects that address one of the following areas:

- (a) Substantially improving student outcomes without commensurately increasing per-student costs.
- (b) Maintaining student outcomes while substantially decreasing per-student costs.
- (c) Substantially improving student outcomes while substantially decreasing per-student costs.

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. Under this priority, we provide funding to projects that enable broad adoption of effective practices. An application proposing to address this priority must, as part of its application:

- (a) Identify the practice or practices that the application proposes to prepare for broad adoption, including formalizing the practice (i.e., establish and define key elements of the practice), codifying (i.e.,

develop a guide or tools to support the dissemination of information on key elements of the practice), and explaining why there is a need for formalization and codification.

(b) Evaluate different forms of the practice to identify the critical components of the practice that are crucial to its success and sustainability, including the adaptability of critical components to different teaching and learning environments and to diverse learners.

(c) Provide a coherent and comprehensive plan for developing materials, training, toolkits, or other supports that other entities would need in order to implement the practice effectively and with fidelity.

(d) Commit to assessing the replicability and adaptability of the practice by supporting the implementation of the practice in a variety of locations during the project period using the materials, training, toolkits, or other supports that were developed for the i3-supported practice.

Strengths:

The applicant identifies a set of practices that will be prepared for broad adoption (teacher support, support for rigorous teaching of Common Core standards, raising student achievement) through the proposed project. The applicant will develop teaching modules, books, videos, and archives of exemplary student work as part of the training. For example, the EL project will include a "master practitioner" set of books and videos that will include useful examples of case studies, teaching tools and instructional videos (p. e18). The use of materials that are developed by teachers for teachers is unique and provides a much needed practice-based approach to reaching the goals of the proposed project. Additionally, plans to publish three books for national distribution will enhance the opportunities for national adoption as well as enhancing the learning opportunities for teachers across the county. This is consistent with a national approach to teaching and learning (Common Core) and a national approach to increasing teacher effectiveness, teacher retention, and student achievement.

Weaknesses:

No weaknesses were found.

Reader's Score: 2

Invitational Priority - Invitational Priority

1. The Secretary encourages applicants to propose projects that incorporate high-quality early learning components that are aligned with the early learning, elementary and secondary education systems in participating schools and help ensure that all children, especially those from low-income families, enter kindergarten ready to succeed.

General:

NA

Reader's Score: 0

Status: Submitted
Last Updated: 08/20/2013 06:40 PM

Status: Submitted

Last Updated: 08/21/2013 11:44 AM

Technical Review Coversheet

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Reader #2: *****

	Points Possible	Points Scored
Questions		
Summary Statement		
Summary Statement		
1. Summary Statement	0	
Selection Criteria		
Significance		
1. Significance	20	0
Quality of Project Design		
1. Project Design	20	0
Quality of the Management Plan		
1. Management Plan	20	0
Quality of Project Personnel		
1. Personnel	10	0
Quality of the Project Evaluation		
1. Project Evaluation	30	30
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP 1	1	
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP 2	2	
Invitational Priority		
Invitational Priority		
1. Invitational Priority	0	
Total	103	30

Technical Review Form

Panel #2 - i3 Validation - 2: 84.411B

Reader #2: *****

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Questions

Summary Statement - Summary Statement

1. Summary Statement (Optional):

General:

Reader's Score:

Selection Criteria - Significance

1. In determining the significance of the project, the Secretary considers the following factors:

(1) The likelihood that the project will have the estimated impact, including the extent to which the applicant demonstrates that unmet demand for the proposed project or the proposed services will enable the applicant to reach the proposed level of scale.

(2) The feasibility of national expansion if favorable outcomes are achieved.

Strengths:

N/A

Weaknesses:

N/A

Reader's Score: 0

Selection Criteria - Quality of Project Design

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

(1) The extent to which the proposed project addresses the national need and priorities the applicant is seeking to meet.

(2) The extent to which the proposed project has a clear set of goals and an explicit plan or actions to achieve the goals, including identification of any elements of the project logic model that require further testing or development.

(3) The extent to which the applicant will use grant funds to address a particular barrier or barriers that prevented the applicant, in the past, from reaching the level of scale proposed in the application.

Strengths:

N/A

Weaknesses:

N/A

Reader's Score: 0

Selection Criteria - Quality of the Management Plan

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

(1) The extent to which the management plan articulates key responsibilities and well-defined objectives, including the timelines and milestones for completion of major project activities, the metrics that will be used to assess progress on an ongoing basis, and annual performance targets the applicant will use to monitor whether the project is achieving its goals.

(2) The clarity and coherence of the applicant's multi-year financial and operating model and accompanying plan to operate the project at a national or regional (as defined in the Validation Notice Inviting Applications) during the project period.

Strengths:

N/A

Weaknesses:

N/A

Reader's Score: 0

Selection Criteria - Quality of Project Personnel

1. In determining the quality and personnel for the proposed project, the Secretary considers the following factor:

(1) The adequacy of the project's staffing plan, particularly for the first year of the project, including the identification of the project director and, in the case of projects with unfilled key personnel positions at the beginning of the project, that the staffing plan identifies how critical work will proceed.

(2) The qualifications and experience of the project director and other key project personnel and the extent to which they have the expertise to accomplish the proposed tasks.

Strengths:

N/A

Weaknesses:

N/A

Reader's Score: 0

Selection Criteria - Quality of the Project Evaluation

1. In determining the quality of the project evaluation to be conducted, the Secretary considers the following factors:

- (1) The clarity and importance of the key questions to be addressed by the project evaluation, and the appropriateness of the methods for how each question will be addressed.
- (2) 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 Evidence Standards without reservations.
- (3) The extent to which the evaluation will study the project at the proposed level of scale, including, where appropriate, generating information about potential differential effectiveness of the project in diverse settings and for diverse student population groups.
- (4) The extent to which the evaluation plan includes a clear and credible analysis plan, including a proposed sample size and minimum detectable effect size that aligns with the expected project impact, and an analytic approach for addressing the research questions.
- (5) The extent to which the evaluation plan clearly articulates the key components and outcomes of the project, as well as a measureable threshold for acceptable implementation.

Strengths:

The applicant's research design is based on a true-experimental approach, utilizing hierarchical linear modeling to address teacher, classroom, and student outcomes as defined in the proposal on pg. e53. The applicant provided appropriate research questions which link directly to the stated objectives; the applicant then defines the key variables, data collection method for the variable, and the measurable outcome associated with each variable on pgs. e49-e50, which constitutes their logic model. In addition, a well-designed research methodology should discuss the effect size they are positing. In order to hypothesize an effect size, sample size and power must be determined. The applicant provided this detailed information, as an example on page e54, "The study is powered to detect a policy-relevant impact of .14 standard deviations (SDs) on student achievement." Finally, the applicant has secured a project director of the independent evaluation. This is significant, because the project director is a principal investigator for What Works Clearinghouse (WWC), and there is no doubt that he will ensure that the high-level standards of WWC are met to make casual claims. There were no weaknesses found with the evaluation component of the application.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weaknesses.

Reader's Score: 30

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. Under this priority, we provide funding to projects that address one of the following areas:

- (a) Substantially improving student outcomes without commensurately increasing per-student costs.
- (b) Maintaining student outcomes while substantially decreasing per-student costs.

(c) Substantially improving student outcomes while substantially decreasing per-student costs.

Strengths:

Weaknesses:

Reader's Score:

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. Under this priority, we provide funding to projects that enable broad adoption of effective practices. An application proposing to address this priority must, as part of its application:

(a) Identify the practice or practices that the application proposes to prepare for broad adoption, including formalizing the practice (i.e., establish and define key elements of the practice), codifying (i.e., develop a guide or tools to support the dissemination of information on key elements of the practice), and explaining why there is a need for formalization and codification.

(b) Evaluate different forms of the practice to identify the critical components of the practice that are crucial to its success and sustainability, including the adaptability of critical components to different teaching and learning environments and to diverse learners.

(c) Provide a coherent and comprehensive plan for developing materials, training, toolkits, or other supports that other entities would need in order to implement the practice effectively and with fidelity.

(d) Commit to assessing the replicability and adaptability of the practice by supporting the implementation of the practice in a variety of locations during the project period using the materials, training, toolkits, or other supports that were developed for the i3-supported practice.

Strengths:

Weaknesses:

Reader's Score:

Invitational Priority - Invitational Priority

1. The Secretary encourages applicants to propose projects that incorporate high-quality early learning components that are aligned with the early learning, elementary and secondary education systems in participating schools and help ensure that all children, especially those from low-income families, enter kindergarten ready to succeed.

General:

Reader's Score:

Status: Submitted

Last Updated: 08/21/2013 11:44 AM

Status: Submitted

Last Updated: 08/20/2013 04:03 PM

Technical Review Coversheet

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Reader #3: *****

	Points Possible	Points Scored
Questions		
Summary Statement		
Summary Statement		
1. Summary Statement	0	
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	20	20
Quality of the Management Plan		
1. Management Plan	20	19
Quality of Project Personnel		
1. Personnel	10	10
Quality of the Project Evaluation		
1. Project Evaluation	30	0
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP 1	1	0
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP 2	2	2
Invitational Priority		
Invitational Priority		
1. Invitational Priority	0	
Total	103	71

Technical Review Form

Panel #2 - i3 Validation - 2: 84.411B

Reader #3: *****

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Questions

Summary Statement - Summary Statement

1. Summary Statement (Optional):

General:

Reader's Score:

Selection Criteria - Significance

1. In determining the significance of the project, the Secretary considers the following factors:

(1) The likelihood that the project will have the estimated impact, including the extent to which the applicant demonstrates that unmet demand for the proposed project or the proposed services will enable the applicant to reach the proposed level of scale.

(2) The feasibility of national expansion if favorable outcomes are achieved.

Strengths:

Strengths in the Significance of the proposed project included

Currently Expeditionary Learning (EL) at a national level and impacts 165 schools, 4, 00 teachers and 45,000 students in 30 students (page 5).

Proposed project will impact 48,000 students in 60 schools (page 9)

High need students served in the participating schools (page 5).

EL model has broadened its scalability and moved from school to school implementation to a district to district approach (page 6).

This project would increase the PD resources to include examples of Common Core Standard student writing samples (page 1).

Quality materials developed from evaluating best practices from the teacher –generated curriculums in EL schools (page 1).

Validation grant would enable EL to demonstrate a model of PD for novice teachers which could be scaled to a national level (page 7).

Project will address the research identified unmet need of under prepared novice teachers (page 3).

EL has a 20 year history of developing strong PD which has been validated through external evaluations (pages 4& 5).

Curriculum and PD resources available online at no cost which will support national expansion of the plan (page 9).

Estimated 600 plus schools will be using the curriculum by 2014-2015 (page 10).

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

- (1) The extent to which the proposed project addresses the national need and priorities the applicant is seeking to meet.**
- (2) The extent to which the proposed project has a clear set of goals and an explicit plan or actions to achieve the goals, including identification of any elements of the project logic model that require further testing or development.**
- (3) The extent to which the applicant will use grant funds to address a particular barrier or barriers that prevented the applicant, in the past, from reaching the level of scale proposed in the application.**

Strengths:

Clearly described and documented the unmet national need of supporting novice teachers to become effective teachers and remain in teaching. For example, more novice teachers work in high poverty schools, 1 percent receive ongoing support, few have an operational curriculum (page 10), 14 % of new teachers leave by the end of the first year, 33 % leave within three years and 50 percent leave within five years (page 11).

Identified barriers of PD for novice teachers: isolation, one-size-fits-all mentoring, focus on survival skills as opposed to student learning and limited collaborations with experienced teachers (page 11).

The proposed project will combine addressing barriers with a research-based structure and supports with high-quality professional development (page 11) as a way to develop novice teacher skills, increase satisfaction, and retention.

Proposed project design included all the identified research based elements to develop effective professional development for novice teachers as well as experiences teachers (chart pages 12 & 13).

Three clear, measurable goals with a measurable objective and specific, measurable Outcomes (page 14).

Use of evidence-based rating scale to measure novice teacher effectiveness (page 14).

Professional development will be authentically implemented through use of the literacy curriculum and professional development based on well defined, research-based components of inquiry-based learning, student engaged assessment, continuous cycles of data-informed self-improvement and reflection (page 15).

Thorough and comprehensive explanation of component activities for the professional development (pages 15 – 17).

Online instructional videos using actual teaching experiences from EL schools (page 15).

Face-to-face training and onsite coaching with supporting online learning (page 16).

Clearly identified four barriers to national implementation with strategies to overcome barriers through the grant. Barriers to be addressed included the development of an external evaluation, completion and enhancement of the online infrastructure to disseminate resources at a national level, completed K-8 literacy curriculum, and increased number of trained staff to be able to accept more implantation contracts for the program (page 18).

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 20

Selection Criteria - Quality of the Management Plan

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

(1) The extent to which the management plan articulates key responsibilities and well-defined objectives, including the timelines and milestones for completion of major project activities, the metrics that will be used to assess progress on an ongoing basis, and annual performance targets the applicant will use to monitor whether the project is achieving its goals.

(2) The clarity and coherence of the applicant's multi-year financial and operating model and accompanying plan to operate the project at a national or regional (as defined in the Validation Notice Inviting Applications) during the project period.

Strengths:

Strengths in the Management Plan of the proposed project included:

Applicant has a successful, documented history of developing and expanding elements of the model to a national scale through grants. For example, New American Schools grant in 1992 and a Bill and Melinda Gates foundation grant in 2003 (page 19).

Selected partner district schools represent a diverse student population, including high need students, to represent a national sample of students (page 19).

Clearly identified key members of the management team; clearly defined responsibilities of each member of the team. The management plan explained over-all leadership through the Project Director and described the local, day-to-day delivery of the program through 12 Development Specialists. Clearly identified staff to implement and manage the long-term and intermediate evaluation, to develop curriculum, and to develop professional development resources (page 20).

Clearly identified intermediate measurement of project objectives for review, feedback and program adjustments (page 22).

Clearly identified project timeline and milestones of activities (page 23).

The applicant already has a national organization in place to provide national service which would be utilized to provide the expanded and enhanced model at the national level (page 25).

The applicant described a solid financial basis, moving from philanthropic revenue to fee-based revenue, which will be

able to sustain a national implementation of the project (page 24).

Weaknesses:

Weaknesses in the Management of the proposed project included:

The applicant failed to describe a clear plan for communications between the various members of the management team located in various school districts and states; lack of a communication plan will limit effective operations and management.

Reader's Score: 19

Selection Criteria - Quality of Project Personnel

1. In determining the quality and personnel for the proposed project, the Secretary considers the following factor:

(1) The adequacy of the project's staffing plan, particularly for the first year of the project, including the identification of the project director and, in the case of projects with unfilled key personnel positions at the beginning of the project, that the staffing plan identifies how critical work will proceed.

(2) The qualifications and experience of the project director and other key project personnel and the extent to which they have the expertise to accomplish the proposed tasks.

Strengths:

The description of the qualifications for personnel to staff the project was well-developed. Strengths included:

Personnel for the identified key positions were well qualified, bringing extensive and varied experiences and expertise to the management team (pages 26 – 30 and resumes in Appendix) and aligned with the identified responsibilities.

Numerous staff, including EL's President and CEO, have been employees of the applicant and with this background, will be well poised to support the project.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 10

Selection Criteria - Quality of the Project Evaluation

1. In determining the quality of the project evaluation to be conducted, the Secretary considers the following factors:

(1) The clarity and importance of the key questions to be addressed by the project evaluation, and the appropriateness of the methods for how each question will be addressed.

(2) 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 Evidence Standards without reservations.

(3) The extent to which the evaluation will study the project at the proposed level of scale, including, where appropriate, generating information about potential differential effectiveness of the project in diverse settings and for diverse student population groups.

(4) The extent to which the evaluation plan includes a clear and credible analysis plan, including a proposed sample size and minimum detectable effect size that aligns with the expected project impact, and an analytic approach for addressing the research questions.

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

Strengths:

Not applicable.

Weaknesses:

Not applicable.

Reader's Score: 0

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. Under this priority, we provide funding to projects that address one of the following areas:

- (a) Substantially improving student outcomes without commensurately increasing per-student costs.
- (b) Maintaining student outcomes while substantially decreasing per-student costs.
- (c) Substantially improving student outcomes while substantially decreasing per-student costs.

Strengths:

Competitive Priority 1 was not addressed.

Weaknesses:

Competitive Priority 1 was not addressed.

Reader's Score: 0

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. Under this priority, we provide funding to projects that enable broad adoption of effective practices. An application proposing to address this priority must, as part of its application:

- (a) Identify the practice or practices that the application proposes to prepare for broad adoption, including formalizing the practice (i.e., establish and define key elements of the practice), codifying (i.e.,

develop a guide or tools to support the dissemination of information on key elements of the practice), and explaining why there is a need for formalization and codification.

(b) Evaluate different forms of the practice to identify the critical components of the practice that are crucial to its success and sustainability, including the adaptability of critical components to different teaching and learning environments and to diverse learners.

(c) Provide a coherent and comprehensive plan for developing materials, training, toolkits, or other supports that other entities would need in order to implement the practice effectively and with fidelity.

(d) Commit to assessing the replicability and adaptability of the practice by supporting the implementation of the practice in a variety of locations during the project period using the materials, training, toolkits, or other supports that were developed for the i3-supported practice.

Strengths:

The applicant provided a clear explanation for the development of components of the program which will enable broad adoption. For example, the ELA curriculum aligned to teach the Common Core standards will be formalized and available nationally through an online source. Additionally, master practitioner instructional videos and books will be published for a national audience. Exemplar student work will be archived online for national use with the curriculum and training materials. The applicant described how the program will be adaptable to different teaching environments for diverse learners. The applicant described the multiple sites at which the project will be implemented as well as the online availability of the training materials and resources (pages 1 & 2).

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 2

Invitational Priority - Invitational Priority

1. The Secretary encourages applicants to propose projects that incorporate high-quality early learning components that are aligned with the early learning, elementary and secondary education systems in participating schools and help ensure that all children, especially those from low-income families, enter kindergarten ready to succeed.

General:

Reader's Score:

Status: Submitted
Last Updated: 08/20/2013 04:03 PM

Status: Submitted

Last Updated: 08/21/2013 10:55 AM

Technical Review Coversheet

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Reader #4: *****

	Points Possible	Points Scored
Questions		
Summary Statement		
Summary Statement		
1. Summary Statement	0	
Selection Criteria		
Significance		
1. Significance	20	20
Quality of Project Design		
1. Project Design	20	20
Quality of the Management Plan		
1. Management Plan	20	20
Quality of Project Personnel		
1. Personnel	10	10
Quality of the Project Evaluation		
1. Project Evaluation	30	0
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP 1	1	0
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP 2	2	2
Invitational Priority		
Invitational Priority		
1. Invitational Priority	0	
Total	103	72

Technical Review Form

Panel #2 - i3 Validation - 2: 84.411B

Reader #4: *****

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Questions

Summary Statement - Summary Statement

1. Summary Statement (Optional):

General:

Reader's Score:

Selection Criteria - Significance

1. In determining the significance of the project, the Secretary considers the following factors:

(1) The likelihood that the project will have the estimated impact, including the extent to which the applicant demonstrates that unmet demand for the proposed project or the proposed services will enable the applicant to reach the proposed level of scale.

(2) The feasibility of national expansion if favorable outcomes are achieved.

Strengths:

The applicant has identified support for novice teachers (p.e20) to deliver high quality instruction to high- needs students as the unmet need particularly in the context of national adoption of Common Core State Standards. The level of impact is significant as the applicant expects to effect 48,000 students in three states (p.e15). While an array of professional development opportunities exist for teachers in general, there does not appear to be professional development focused on novice teachers in particular. The applicant proposes a blended approach for enhancing the skills of novice teachers that will include on-site coaching, off-site institutes, and online resources. This model is retrofitted for national expansion based on recognized best practices included in the blended model. The Expeditionary Learning model has drawn on a 20 year history in 30 states to establish a model that was created by teachers for teachers (p.e21).

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 20

Selection Criteria - Quality of Project Design

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

(1) The extent to which the proposed project addresses the national need and priorities the applicant is seeking to meet.

(2) The extent to which the proposed project has a clear set of goals and an explicit plan or actions to achieve the goals, including identification of any elements of the project logic model that require further testing or development.

(3) The extent to which the applicant will use grant funds to address a particular barrier or barriers that prevented the applicant, in the past, from reaching the level of scale proposed in the application.

Strengths:

The strength in this selection criterion is the applicant's ability to conjoin national and local elements in a solid induction program to address the unmet need of professional development for novice teachers. The Expeditionary Learning model (p.e29) builds on Common Core infusion that at the same time acknowledges the local school's philosophy and goals. The model includes mentorship, collaboration, and appropriate time to master the identified tasks. The delivery model (p.e30) approximates Blooms taxonomy with sequential skill building. Other strengths within the design include a blended approach (p.e33) to novice training and a LA curriculum that includes an acceleration component as well as a remediation component in the 8 week model. The applicant has identified four barriers to scale, but has established a solid plan to remedy those barriers through grant funding.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 20

Selection Criteria - Quality of the Management Plan

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

(1) The extent to which the management plan articulates key responsibilities and well-defined objectives, including the timelines and milestones for completion of major project activities, the metrics that will be used to assess progress on an ongoing basis, and annual performance targets the applicant will use to monitor whether the project is achieving its goals.

(2) The clarity and coherence of the applicant's multi-year financial and operating model and accompanying plan to operate the project at a national or regional (as defined in the Validation Notice Inviting Applications) during the project period.

Strengths:

The management plan identifies roles and responsibilities (p.e27) and well-defined objectives in two of the three goals. The criterion is strongly addressed through the inclusion of metric and performance targets (p.e39) that present a clear picture of expectations for the cohort group. The applicant presents a solid financial plan that has exceeded revenue goals (p.e41) while at the same time reducing dependency on philanthropy.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 20

Selection Criteria - Quality of Project Personnel

1. In determining the quality and personnel for the proposed project, the Secretary considers the following factor:

(1) The adequacy of the project's staffing plan, particularly for the first year of the project, including the identification of the project director and, in the case of projects with unfilled key personnel positions at the beginning of the project, that the staffing plan identifies how critical work will proceed.

(2) The qualifications and experience of the project director and other key project personnel and the extent to which they have the expertise to accomplish the proposed tasks.

Strengths:

The resumes presented by the applicant demonstrate a variety of skill sets that will make for a successful program and will be more than adequate for the proposed delivery of services. The project director has a solid financial background and advanced degree in business. Additional skills present in the staff include strategic planning, information technology, materials developer, and survey director. Many of the staff have a history with Expeditionary Learning program and have come up through the ranks experiencing various levels of responsibility in the system.

Weaknesses:

This criterion was thoroughly discussed and I did not find any weakness.

Reader's Score: 10

Selection Criteria - Quality of the Project Evaluation

1. In determining the quality of the project evaluation to be conducted, the Secretary considers the following factors:

(1) The clarity and importance of the key questions to be addressed by the project evaluation, and the appropriateness of the methods for how each question will be addressed.

(2) 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 Evidence Standards without reservations.

(3) The extent to which the evaluation will study the project at the proposed level of scale, including, where appropriate, generating information about potential differential effectiveness of the project in diverse settings and for diverse student population groups.

(4) The extent to which the evaluation plan includes a clear and credible analysis plan, including a proposed sample size and minimum detectable effect size that aligns with the expected project impact, and an analytic approach for addressing the research questions.

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

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. Under this priority, we provide funding to projects that address one of the following areas:
 - (a) Substantially improving student outcomes without commensurately increasing per-student costs.
 - (b) Maintaining student outcomes while substantially decreasing per-student costs.
 - (c) Substantially improving student outcomes while substantially decreasing per-student costs.

Strengths:

No indication

Weaknesses:

No indication

Reader's Score: 0

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. Under this priority, we provide funding to projects that enable broad adoption of effective practices. An application proposing to address this priority must, as part of its application:
 - (a) Identify the practice or practices that the application proposes to prepare for broad adoption, including formalizing the practice (i.e., establish and define key elements of the practice), codifying (i.e., develop a guide or tools to support the dissemination of information on key elements of the practice), and explaining why there is a need for formalization and codification.
 - (b) Evaluate different forms of the practice to identify the critical components of the practice that are crucial to its success and sustainability, including the adaptability of critical components to different teaching and learning environments and to diverse learners.
 - (c) Provide a coherent and comprehensive plan for developing materials, training, toolkits, or other supports that other entities would need in order to implement the practice effectively and with fidelity.
 - (d) Commit to assessing the replicability and adaptability of the practice by supporting the implementation of the practice in a variety of locations during the project period using the materials, training, toolkits, or other supports that were developed for the i3-supported practice.

Strengths:

The project design addresses the required components to meet the identified priority. The Expeditionary Learning model embeds district philosophy and goals (p.e29) within its framework allowing for easier adoption of the model. Aligned with the Common Core Curriculum, the program has 36 modules accessible online. Books and videos also support the approach. The applicant has detailed an outline for replicability (p.e18) that will be crucial for districts considering adoption.

Weaknesses:

This criterion was thoroughly discussed and I did not find any strengths/weakness.

Reader's Score: 2

Invitational Priority - Invitational Priority

1. The Secretary encourages applicants to propose projects that incorporate high-quality early learning components that are aligned with the early learning, elementary and secondary education systems in participating schools and help ensure that all children, especially those from low-income families, enter kindergarten ready to succeed.

General:

Reader's Score:

Status: Submitted
Last Updated: 08/21/2013 10:55 AM

Status: Submitted

Last Updated: 08/20/2013 09:48 AM

Technical Review Coversheet

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Reader #5: *****

	Points Possible	Points Scored
Questions		
Summary Statement		
Summary Statement		
1. Summary Statement	0	
Selection Criteria		
Significance		
1. Significance	20	0
Quality of Project Design		
1. Project Design	20	0
Quality of the Management Plan		
1. Management Plan	20	0
Quality of Project Personnel		
1. Personnel	10	0
Quality of the Project Evaluation		
1. Project Evaluation	30	28
Priority Questions		
Competitive Preference Priority 1		
Competitive Preference Priority 1		
1. CPP 1	1	
Competitive Preference Priority 2		
Competitive Preference Priority 2		
1. CPP 2	2	
Invitational Priority		
Invitational Priority		
1. Invitational Priority	0	
Total	103	28

Technical Review Form

Panel #2 - i3 Validation - 2: 84.411B

Reader #5: *****

Applicant: Expeditionary Learning Outward Bound, Inc. (U411B130041)

Questions

Summary Statement - Summary Statement

1. Summary Statement (Optional):

General:

Reader's Score:

Selection Criteria - Significance

1. In determining the significance of the project, the Secretary considers the following factors:

(1) The likelihood that the project will have the estimated impact, including the extent to which the applicant demonstrates that unmet demand for the proposed project or the proposed services will enable the applicant to reach the proposed level of scale.

(2) The feasibility of national expansion if favorable outcomes are achieved.

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Selection Criteria - Quality of Project Design

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

(1) The extent to which the proposed project addresses the national need and priorities the applicant is seeking to meet.

(2) The extent to which the proposed project has a clear set of goals and an explicit plan or actions to achieve the goals, including identification of any elements of the project logic model that require further testing or development.

(3) The extent to which the applicant will use grant funds to address a particular barrier or barriers that prevented the applicant, in the past, from reaching the level of scale proposed in the application.

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Selection Criteria - Quality of the Management Plan

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

(1) The extent to which the management plan articulates key responsibilities and well-defined objectives, including the timelines and milestones for completion of major project activities, the metrics that will be used to assess progress on an ongoing basis, and annual performance targets the applicant will use to monitor whether the project is achieving its goals.

(2) The clarity and coherence of the applicant's multi-year financial and operating model and accompanying plan to operate the project at a national or regional (as defined in the Validation Notice Inviting Applications) during the project period.

Strengths:

NA

Weaknesses:

NA

Reader's Score: 0

Selection Criteria - Quality of Project Personnel

1. In determining the quality and personnel for the proposed project, the Secretary considers the following factor:

(1) The adequacy of the project's staffing plan, particularly for the first year of the project, including the identification of the project director and, in the case of projects with unfilled key personnel positions at the beginning of the project, that the staffing plan identifies how critical work will proceed.

(2) The qualifications and experience of the project director and other key project personnel and the extent to which they have the expertise to accomplish the proposed tasks.

Strengths:

NA

Weaknesses:

NA

Selection Criteria - Quality of the Project Evaluation

1. In determining the quality of the project evaluation to be conducted, the Secretary considers the following factors:

- (1) The clarity and importance of the key questions to be addressed by the project evaluation, and the appropriateness of the methods for how each question will be addressed.
- (2) 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 Evidence Standards without reservations.
- (3) The extent to which the evaluation will study the project at the proposed level of scale, including, where appropriate, generating information about potential differential effectiveness of the project in diverse settings and for diverse student population groups.
- (4) The extent to which the evaluation plan includes a clear and credible analysis plan, including a proposed sample size and minimum detectable effect size that aligns with the expected project impact, and an analytic approach for addressing the research questions.
- (5) The extent to which the evaluation plan clearly articulates the key components and outcomes of the project, as well as a measureable threshold for acceptable implementation.

Strengths:

The key research questions are well-defined and appropriate for the planned scale-up of the Expeditionary Learning program (page 32). The questions address the three main components of the project – impacts of the professional development component on student achievement, novice teacher practice, and retention of novice teachers. The planned randomized control trial and quasi-experimental design are appropriate for assessing differences due to length of time and professional development. The planned correlational analyses are appropriate for identifying factors impacting program success. The evaluation plan includes details about the recruiting, training, and certification of experienced teachers to serve as observers and also includes plans to evaluate inter-rater reliability (page 36). The proposed use of regression analysis and linear model is appropriate for the types of data collected (page 36). Methods for creating cohorts to be studied under the randomized control trial (page 34) and for the quasi-experimental design (page 38) are appropriate. Explanations for sample size determination were provided (pages 35 and 37) along with projected minimum impacts in terms of standard deviations (page 37). The evaluation plan includes a detailed logic model (page 32) and specific data sources for each of the three main analyses (page 33). The evaluation plan is appropriate for demonstrating the effectiveness of the EL model for improving the effectiveness of novice teachers at the proposed level of scale. The role of the different components of the evaluation plan is well documented in the Overview of Study Components and Logic Model (page 32). A model for data analysis is provided (page 36) that includes an estimate of the overall impact of EL.

Weaknesses:

Project timeline – even though the schools in both the treatment and control groups will have already begun implementation of the EL program, it is not clear how or if the two cohorts will differ beyond the length of time they have received intensive program supports. In particular, it is not clear whether or not the treatment group will experience the full range of instructor supports since their cohort begins during the planning phase (page 23) possibly before the completion of the additional 12 Common Core Literacy modules and additional online resources are made available. Project assessments do not include methods for evaluating the impacts of separate professional development components (e.g., professional institutes, on-site coaching, and leadership support – page 32). It also does not include evaluation of the targeted dimensions of pedagogy (e.g., inquiry-based learning, student engaged assessment, and continuous cycles of data-informed self-improvement and reflection – page 8). Although the evaluation plan includes details about recruiting, training, and certification of experienced teachers to be observers, the evaluation plan does not indicate whether or not observers will be aware of which cohort they are observing, which would be relevant once the

second cohort begins.

Reader's Score: 28

Priority Questions

Competitive Preference Priority 1 - Competitive Preference Priority 1

1. Under this priority, we provide funding to projects that address one of the following areas:
 - (a) Substantially improving student outcomes without commensurately increasing per-student costs.
 - (b) Maintaining student outcomes while substantially decreasing per-student costs.
 - (c) Substantially improving student outcomes while substantially decreasing per-student costs.

Strengths:

Weaknesses:

Reader's Score:

Competitive Preference Priority 2 - Competitive Preference Priority 2

1. Under this priority, we provide funding to projects that enable broad adoption of effective practices. An application proposing to address this priority must, as part of its application:
 - (a) Identify the practice or practices that the application proposes to prepare for broad adoption, including formalizing the practice (i.e., establish and define key elements of the practice), codifying (i.e., develop a guide or tools to support the dissemination of information on key elements of the practice), and explaining why there is a need for formalization and codification.
 - (b) Evaluate different forms of the practice to identify the critical components of the practice that are crucial to its success and sustainability, including the adaptability of critical components to different teaching and learning environments and to diverse learners.
 - (c) Provide a coherent and comprehensive plan for developing materials, training, toolkits, or other supports that other entities would need in order to implement the practice effectively and with fidelity.
 - (d) Commit to assessing the replicability and adaptability of the practice by supporting the implementation of the practice in a variety of locations during the project period using the materials, training, toolkits, or other supports that were developed for the i3-supported practice.

Strengths:

Weaknesses:

Reader's Score:

Invitational Priority - Invitational Priority

- 1. The Secretary encourages applicants to propose projects that incorporate high-quality early learning components that are aligned with the early learning, elementary and secondary education systems in participating schools and help ensure that all children, especially those from low-income families, enter kindergarten ready to succeed.**

General:

Reader's Score:

Status: Submitted
Last Updated: 08/20/2013 09:48 AM