



**Idaho’s “Building on Success for Future Excellence”  
Grant Program 2024-2029  
Project Narrative**

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## Narrative for Idaho's "Building on Success for Future Excellence"

Idaho's public charter school sector has been one of the nation's **fastest growing** and **highest achieving** over the last five years. This growth was stimulated in part by a \$22 million federal CSP grant awarded to the statewide charter school support organization Bluum in 2018. In its successful *Communities of Excellence* CSP grant, Bluum promised 20 start-up, expansion, or replication charter schools and a total of 8,650 new school seats. By March 2023, Bluum had funded 28 charter schools with an expected 11,467 seats to be created - about 33% more seats than promised in the CSP grant. **This CSP grant proposal builds on the successes, systems, and lessons learned from Idaho's 2018 CSP grant award.**

These CSP subgrantee charter schools operate across the state of Idaho and can be found in the Boise urban core, in suburban areas, and in far-flung rural communities. Some schools are authorized by local school districts, but most are authorized by the Idaho Public Charter School Commission (IPCSC). For a state its size, Idaho has an extraordinary variety of successful charter schools.



Some are K-12 traditional college prep schools while others are classical K-12 academies. But there are also trailblazing Career and Technical Education (CTE) schools for 100% at-risk students, an arts-focused school, and a diverse-by-design progressive STEM school where students are referred to as engineers. Successful homegrown charter school models are beginning to replicate and expand across the state.

Idaho's public charter schools have become **a critical and integrated component of the state's overall K-12 public education system**. Our state's overall K12 enrollment averaged an annual growth rate of 2.05% from 2012-13 to 2021-22. Over the same decade, the overall Idaho charter school enrollment has seen an annual average growth rate of 5.5%. Twenty-five years after the first charter school opened its doors in 1998, there are now more than 70 charter schools serving about 30,000 Idaho students. These schools educate almost 10% of the state's public school students. If all these students were in one school district it would be the state's second largest. Conservatively, there are over 6,000 students on charter school waitlists statewide.

Even with this growth in student enrollment, Idaho's public charter schools are perennially some of the state's highest-performing on state ISAT achievement tests in both English Language Arts (ELA) and mathematics. As a cohort, Idaho charter school students show more academic growth than their peers in traditional district schools. Importantly, this holds for economically disadvantaged and minority students (see Table 1).

**Table 1: Charter Students Outperform All Students Statewide (2020-21 ISAT Data<sup>1</sup>)**

	All Students		Economically Disadvantaged		Minority	
	Charter	Statewide	Charter	Statewide	Charter	Statewide
ELA Proficient	62%	55%	50%	40%	47%	38%
Math Proficient	50%	43%	36%	28%	32%	24%
ELA Adequate Growth	69%	64%	61%	54%	59%	53%
Math Adequate Growth	59%	53%	49%	43%	46%	41%

<sup>1</sup> All data come from Idaho State Board of Education

This proposal seeks to build on the successes and momentum of Idaho's *Communities of Excellence* CSP grant (2018-23). We seek to continue expanding opportunities for students in Idaho to attend excellent charter schools that meet and exceed state academic standards for all students. **Critically important to the success of this proposal is the continuing and ongoing support of the J.A. and Kathryn Albertson Family Foundation (JKAF)** that funds not only the majority of the administrative costs for the successful implementation of this proposed CSP program, but also provides significant grant support to Bluum and partner schools that align with, and support, this *Building on Success for Future Excellence* CSP proposal.

**Our CSP project has three objectives:** 1) increase the number of quality Idaho charter school seats by no less than 5,900 students, especially for our most educationally disadvantaged and rural students through start-up, and/or replication, and/or expansion; 2) support quality authorizing in Idaho while disseminating and supporting best authorizer practices statewide; and 3) evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.

#### **Absolute Priority: Best Practices for Charter School Authorizers**

Idaho has taken steps over 25-years to ensure that all authorized public chartering agencies implement best practice for charter school authorizing. But there is more work to be done. **Bluum is not a state educational agency (SEA)**, but as a nonprofit statewide charter school support organization it can and would allocate technical assistance dollars and expert support from this proposed CSP grant to assist the ongoing improvement efforts of both the Idaho Public Charter School Commission (IPCSC) and school district authorizers. Universities or colleges that might take on authorizing would also be eligible to receive technical assistance for their authorizing efforts through Bluum if we receive this proposed CSP grant.

Idaho state law encourages charter school authorizer quality. The IPCSC and district authorizers are required under state law to create a performance-based accountability system with a comprehensive performance framework and a detailed performance certificate. According to statute (33-5205B. Performance Certificates): “the authorized chartering entity and the governing board of the approved public charter school shall execute a performance certificate that clearly sets forth the academic and operational performance expectations and measures by which the public charter school will be judged and the administrative relationship between the authorized chartering entity and public charter school, including each party’s rights and duties. The performance expectations and measures set forth in the performance certificate shall include, but not be limited to, applicable federal and state accountability requirements.”

Each state approved charter authorizer must annually publish a public performance report for each of its authorized charter schools (see Attachment 1), while each individual charter school must also publish its annual report on its website. Charter schools are required to submit an annual audit. Under Idaho Code 33-5210: “(1) All public charter schools are under the general supervision of the state board of education. (2) Every authorized chartering entity that approves a charter shall be responsible for ensuring that each public charter school program approved by that authorized chartering entity meets the terms of the charter, complies with the general education laws of the state unless specifically directed otherwise in this chapter, and operates in accordance with the state educational standards of thoroughness.”

NACSA ranks Idaho’s charter school authorizing efforts as 20<sup>th</sup> in the nation with a score of 16/33 (see Attachment 2). Two NACSA recommendations in their recent Idaho report include:

- 1) **Institute a default closure policy to make closure the expected outcome for failing charter schools.** To address this politically fraught recommendation, Bluum worked

closely with the Idaho Charter School Network and lawmakers to help pass legislation in 2020 (H0511) requiring “that schools end their fiscal year with at least fifteen days cash on hand, while at the same time ensuring the school has one year to cure any deficiency before the authorizer may begin closure proceedings, and establishing a timeline so the school will not close mid-year.”

**2) Consider policies that encourage the replication of high-performing charter schools.**

Idaho Code 33-5205C “allows Public Charter School replication.” Bluum’s 2018 CSP grant helped stimulate the launch of three Idaho charter school networks in Gem Prep Innovation Schools, Elevate Academies and American Classical Schools of Idaho. All three have grown from one school to several and all three are developing their capacities as non-profit charter school networks. All three also have strong parent demand for further growth and expansion. This second proposed CSP grant, if awarded to Bluum, would allow these nonprofit networks of schools the opportunity to expand their efforts and strengthen their internal capacities to operate high quality schools in coming years.

Again, there is more work to be done to improve Idaho’s authorizing landscape. With support from its 2018 *Communities of Excellent* CSP Award Bluum has worked to support local school districts serving as charter school authorizers. Five of the 28 charter schools supported under Idaho’s 2018 CSP grant are authorized by school districts, and three of these are rural school districts. In March of 2023, Bluum signed a Memorandum of Understanding (see Attachment 3) with the National Network for District Authorizing (NN4DA) to work together in coming years to support Idaho school district authorizers, especially rural district authorizers.

### **Competitive Preference Priority 1: At Least One Non-LEA Authorizer**

The Idaho Public Charter School Commission is the largest authorizer in the state with 60 schools; public school districts authorize 12 more. Under state law state universities, private non-sectarian colleges and community colleges are eligible to authorize public charter schools, but as of the writing of this proposal none have yet decided to do so.

### **Competitive Preference Priority 2: Equitable Financing**

Per Idaho Code 33-5208, “Idaho public charter schools receive equal access to all state and federal dollars afforded traditional public school districts and do so on the same payment schedule.” State and federal revenue provides the foundation for Idaho public charter school budgets. Idaho is one of seven states that use a resource allocation model and fund school districts and charter schools based on positions (teachers, administrators, and classified staff). Idaho’s funding approach also includes distributions, both statutory and non-statutory, for specific programs or purposes. The number of distributions, including operational funds, includes 30 line-items in FY2023. Federal Title funds are mainly tied to poverty rates, and under state law Idaho charter schools have equal access to these federal resources.

**Payment Schedule.** The state department of education is authorized to make an advanced payment of 25% at the end of July and 25% on August 15 based on a public charter school’s estimated annual apportionment for its first year of operation to assist the school with initial start-up costs or payroll obligations. It does so for each year after that as well, provided the charter school is serving more grades or at least 10% more classes than the previous year. Thereafter, public charter schools are funded on the same quarterly payment schedule as all public schools across the state.



**Special Education.** For each student enrolled in charter schools who is entitled to special education services, all state and federal funds from the exceptional child education program for that student stays with the student when they enroll in a public charter school.

**Alternative School Support.** Public charter schools can qualify for alternative school funding. Alternative school funding provides up to 25% more state funding for summer school activities. This is an important revenue stream for school models working to serve some of our most at-risk students.

**Transportation.** State law provides charter schools 60% of their estimated transportation costs, which is the same allocation the state provides public school districts.

Idaho's 115 local school districts have authority to levy taxes for the support of their schools. Such funds are purely discretionary, and do not factor into allocations of state funds. Because charter schools lack any taxing authority, they lack access to local revenue. State and federal funding for charter schools is allocated in the same manner as that of traditional public school districts, the lack of access to local revenues drives disparities in per student revenue between public charter schools and property rich school districts like Boise and Blaine County.

### **Competitive Preference Priority 3: Best Practices to Improve Struggling Schools**

Idaho's 2018 CSP grant provided opportunities for Idaho's public charter schools to support directly, and indirectly, the efforts of local school districts to improve learning opportunities for struggling students, especially needy and underserved students. Elevate Academies received four federal CSP grants through Bluum over five years for their at-risk Career Tech Schools. Elevate Academy East, which is set to open in August 2024, is authorized by the Bonneville Joint School District 93, adjacent to Idaho Falls. All Elevate students are categorized as at-risk. In Idaho, that means meeting at least three of 13 state-set criteria,

including low GPA, high absenteeism, serious medical or personal issues, involvement in the judicial system, or a student who is a parent or pregnant.

Another example of a CSP funded partner charter school in Idaho providing options to struggling students is RISE. A school that opened for the 2021-22 school year in Kimberly, which is a small community in southeastern Idaho. RISE received \$405,615 in CSP grant support through Bluum and currently serves 134 students and expects to ultimately enroll 225 students in grades 4-12. The school was authorized by the local school district as a needed alternative to the more traditional learning approach offered locally. According to Heidi Child, RISE's school director and long-time Kimberly educator, "It has been great for families because as a parent I know that my kids are all very different, even though they've all come from the same family... We have many families that have one child at one of the district elementary schools, one at RISE, and one at the high school. And that has worked wonderfully."

*Bluum's Best Practice Sharing.* One example was the 2023 passage of H267 which allocated \$50 million for CTE Funding for grades 7-12. In discussing this new law during her Legislative Roadshow in April 2023, State Superintendent Debbie Critchfield shared how this program was built around the successes of the Elevate Academy charter schools in helping communities address critical staffing shortages in their local industries such as forestry programs in Northern Idaho.

#### **Competitive Preference Priority 4: Charter School Facilities**

Idaho Code (33.5208(5) Facility Funds) provides a state per pupil facilities allowance. This facility funding is calculated at 50% of what traditional school districts are receiving in local funding for facilities per student. Through this facility allowance charter schools received \$398 per student in FY2022. The state also provided \$69 per student from lottery proceeds.

During the 2023 Legislative Session Idaho lawmakers passed, and Governor Little signed, two bills into law that will assist with charter school facility financing. S1042 helps qualifying, well-established, charter schools obtain lower interest rates on bonds through a financing tool known as a credit enhancement. S1043 created a \$50 million revolving loan fund to help new and young public charter schools obtain lower interest rates on loans. This is an idea that traditional school districts are now discussing as an option to their own facility challenges.

#### **Competitive Preference Priority 5: Serving At-Risk Students**

Idaho's 2018 *Communities of Excellence* CSP grant provided the resources and incentive for Idaho's charter school sector to expand its efforts to serve a larger percentage of Idaho's at-risk students. In that earlier grant we set the goal "to increase the number of quality charter school seats...especially for our most educationally disadvantaged and rural students." We met the goal by working with subgrantees that focused on delivering for at-risk and rural students. For example, the CSP grant support allowed subgrantee schools to purchase buses to ensure students without transportation options of their own could attend the schools. CSP grant support was critical in allowing subgrantee schools to use grant support for kitchen equipment that allowed schools to provide free and reduced-price lunch from day one.

As noted in Priority 3 above, four of the CSP subgrants awarded by Bluum since 2018 were for Elevate Academies that are committed to serving 100% at-risk students. At full enrollment these schools will serve 1,767 at-risk students. Elevate Academies are public charter schools designed to help students at-risk of dropping out find purpose and utility in education, specifically career technical education. Demand for these schools is high across Idaho and a second CSP grant would allow Bluum to offer subgrantee support for future expansion. Two other recent examples of subgrantee schools that received CSP funding in Idaho are Cardinal

Academy and Promise Academy. The Cardinal Academy partners with the Salvation Army in Boise and serves pregnant and parenting teens. Promise Academy is a partnership with the Idaho Youth Ranch. The Idaho Youth Ranch Residential Center for Healing and Resilience serves trauma effected students at its residential center. Promise Academy serves as the onsite charter school and is authorized by the Middleton School district.

*Finally, 12 of the 28 schools that received CSP funding in Idaho since 2018 had NCES codes of Town Remote, Rural Fringe, Town Distant, Town Remote or Rural Remote.*

In 2020, the Idaho Legislature passed a weighted student lottery law (H0512) that gives additional weight in their student enrollment lottery to English language learners, students who are homeless or in foster care, students with disabilities, economically disadvantaged students or at-risk students. This law is being utilized by a growing number of Idaho public charter schools that are seeking to serve a diverse mix of students.

## **A. QUALITY OF PROJECT DESIGN**

*1) The rationale (a)(1)(i) for this proposed grant request is threefold:*

**First, supply of school seats is tight.** Idaho continues to add families and it needs to build more schools to meet this expanding and diversifying student population. According to the U.S. Census, in 2022 Idaho's population grew by 1.8%, making it the state with the second-highest per capita growth rate behind Florida. Between July 2021 and July 2022, 88% of the state's population change came from people moving to Idaho — a slight decrease from 91% of Idaho's population change in 2020.

A 2022 study Bluum commissioned showed Idaho will need to build 104 new schools by 2030 to meet expected student growth. The study, *Idaho Charter Market Analysis: Exploring Growth Opportunities for Idaho Charter Schools* (see Attachment 4), was conducted by the

North Carolina-based research firm Public Impact. It used data from the 2020 U.S. Census. It showed at Idaho's current growth rate, there could be more than 42,000 more K-12 students in the state by 2030, compared to 2020. According to the report, across all age groups combined, Idaho's population is expected to grow in 29 of its 44 counties over the next 10 years. The study showed kindergarten through eighth-grade populations are expected to see the most growth, with an enrollment of 39,480 more K-8 students than in 2020. If an average Idaho elementary school size is 403 students, this means the state would need about 98 new elementary schools by 2030.

**Support (a)(1)(vii):** Charter schools have served as something of a safety valve for rapidly growing districts like West Ada, Kuna, Vallivue (in the Boise area) and Idaho Falls. All face overenrolled buildings and burgeoning class sizes. The West Ada School District, Idaho's largest, is projecting it will see 11,000 new students over the next decade, with the biggest anticipated need for elementary schools, according to a presentation given to the Meridian City Council in April 2022. In Kuna, as reported by Idaho Ed News in April 2023: "The district expects student enrollment to climb over the next 10 years from just under 6,000 to nearly 10,000, according to a district report." In eastern Idaho, during a recent Facebook Live Superintendent chat Bonneville Superintendent Scott Woolstenhulme said middle schools are at capacity and moving 6th-graders into the middle schools wouldn't be a feasible option to address the crowded elementary schools.

This growth in student numbers is happening even faster in more rural parts of Idaho. Multiple schools in Idaho districts are at, or over capacity.

**Second, Idaho's charter sector is well-established, capable of adding students, and high-performing.** Since the first Idaho charter school opened its door in 1998 the number of schools and student enrollment have grown steadily from 1 school in 1998 to more than 70 in

2023. From 2017-18 to 2021-22, enrollment in charter schools grew by 7,268 students and many of these attended schools funded by the CSP grant administered by Bluum.

YEAR	ID K-12 Enrollment	ID Charter Enrollment	% Enrolled in Charters
2021-22	319,067	29,204	9.2%
2020-21	316,159	31,576*	10%
2019-20	310,653	25,364	8.1%
2018-19	307,228	24,004	7.8%
2017-18	300,520	21,936	7.3%
2009-10	278,633	14,611	5%
2005-06	261,179	8,003	3%
1998-99	244,523	168	.068%

\* **Online charter school enrollment** has been declining over time despite a Covid-19 spike in 2020-21.

Idaho’s public charter schools as a sector are high-performing academically. NAEP is considered the “Gold Standard” for evaluating student performance over time across the nation’s schools. The 2022 results were a painful reminder of the impact of COVID-19 and school shutdowns on our students’ academic performance in Math and English. In Idaho, 4th-graders scored far behind their 2019 scores. In reading, Idaho’s 4th-graders saw their average scale score decline from 223 to 215, and in math from 242 to 236. Fourth-graders attending public charter schools outperformed these Idaho averages in both 2019 and 2022, but also saw a real decline in both reading and math performance. Idaho’s 8<sup>th</sup> graders performed well in both reading and math compared to the rest of the country with Idaho’s 8<sup>th</sup> grade charter students performing only behind DoDEA schools.

**Despite the impact of COVID on student learning, Idaho public charter school performance remains relatively high** compared to the performance of students in Idaho’s traditional schools, and in 2022 they were some of the highest performing students in the nation across grades and subjects tested. The NAEP summary table below attest to this fact.

**Table 2: 2022 Idaho NAEP Results in 8<sup>th</sup> Grade Reading & Math**

2022 8th Grade NAEP Performance by Jurisdiction - Reading				2022 8th Grade NAEP Performance by Jurisdiction - Math			
Rank	Jurisdiction	Student Group	Average Scale Score	Rank	Jurisdiction	Student Group	Average Scale Score
1	DoDEA	All	282	1	DoDEA	All	292
2	Idaho	Charters	276	2	Idaho	Charters	291
3	New Jersey	All	270	3	Massachusetts	All	284
4	Massachusetts	All	269	4	Idaho	All	282
5	Utah	All	265	5	Utah	All	282
6	Connecticut	All	264	6	New Jersey	All	281
7	Idaho	All	264	7	South Dakota	All	281
8	Vermont	All	264	8	Wisconsin	All	281
9	Colorado	All	263	9	Wyoming	All	281
10	New Hampshire	All	263	10	Minnesota	All	280

**Third, parent demand and public support for Idaho charter schools is robust.**

**Evidence of demand (a)(1)(vii):** Conservatively, and based on surveys of charter school waitlists, we estimate there are currently 6,000 students on waitlists to get into Idaho charter schools. As part of Bluum’s 2018 CSP grant project we engaged the New York City-based FDR Group to survey parent satisfaction in CSP funded charter schools. A total of 2,149 parents responded to the invitation to participate in the 2022 CSP grant school survey. The survey was conducted between May 5 and June 1, 2022, with parents from 19 CSP grant funded schools participating. The survey results indicate that parents are broadly satisfied with their charter schools and give them high ratings on specific evaluative criteria such as teacher quality, communication, and safety. Parents believe their children are learning, and they would not hesitate to recommend their charter school to other parents.

Specific findings included (see Attachment 5):

- *65% of parents are very satisfied with their child’s charter school, another 27% somewhat satisfied.*
- *About half (49%) strongly agree and 37% somewhat agree with this statement: “I trust this school to do what is right for my child.”*

- 72% say their child will “definitely stay in this school” in the next school year, another 13% say “probably stay.” Only 9% indicate they will probably change schools to look for a better fit.
- 66% report their child is happy on a day-to-day basis when it’s time to go to school; only handfuls say their child is unhappy (3%) or indifferent (7%). About 1 in 4 (24%) say it’s mixed.
- Parents overwhelmingly agree that “The school welcomes parents into the building”—60% agree strongly, 27% agree somewhat.

Over the 5-year term of Bluum’s *Communities of Excellence* CSP grant, we commissioned three years of qualitative and quantitative research efforts with charter school teachers, parents, and administrators. Table 3 provides a summary for this outreach (see Attachment 6).

**Table 3: Summary of # of Participants in CSP Grant Focus Groups & Survey Research**

	2019-20 (Baseline)	2020-21 (Covid-Focus)	2021-22 (Trends)
# Schools Participating	8	12	19
# In-depth interviews with Education Leaders	7	14	8
# Parent Participants in Focus Groups	32	7	6
# Parents Survey Respondents	947	1,489	2,149
# Teacher Participants in Focus Groups	43	8	6
# Teachers Survey Respondents	139	322	367

Bluum believes in giving voice to key education stakeholders, as demonstrated by the above table. We will continue to seek out and highlight their voice if this CSP grant is funded.

**Sharing Best Practices (a)(1)(ix):** This research work serves as a powerful model for larger school improvement efforts in Idaho. In the Idaho legislature there is bipartisan support for Idaho’s public charter schools. During the 2023 legislative session two charter school facility funding bills were introduced (see above Competitive Preference Priority 4: Charter School Facilities). Both passed out of the legislature with overwhelming support. S1042 (Credit Enhancement Bill) passed out of the Senate 33-0-2 and out of the House 68-1-1. S1043 (Charter School Revolving Loan Fund) passed out of the Senate 35-0 and out of the House 66-3-1.



**Working to strengthen state system and develop cohesive state strategy (a)(2)(ii) & (a)(2)(iii):** When Governor Brad Little started his first term as Governor in 2019 he convened his “Our Kids, Idaho’s Future” K-12 Task Force. Terry Ryan, CEO of Bluum and Project Director for Idaho’s 2018 *Communities of Excellence* CSP grant and primary author of this CSP grant proposal, served as one of 26 “servants of the state and community” that “came together to collectively add experience and insight in an effort to build on previous task force goals and outcomes.”

Charter schools are well-regarded in Idaho and are considered not only partners to traditional public schools, but engines of innovation that are looked at for sharing best and promising practices across all Idaho schools. Creative approaches to facility financing in the charter school sector are having an influence on how school districts and state policy makers think about funding facilities. Charter flexibilities in the certification of school leaders and teachers in an environment of staffing shortages, especially in rural districts, are edging from charter policy to district policy.

If it can work for public charter schools then why not for district schools? We also see educators move from the charter school sector to the public school sector and vice-versa. The attitude of we are all in this together is becoming more prevalent across Idaho. One of the most interesting examples of this is the path of Idaho educator Ryan Cantrell. He started in a public charter school as an administrator and moved on to lead a rural/remote school district. He now serves as state Chief Deputy Superintendent for the state department of education. This proposed CSP grant would allow us to create new opportunities for collaboration across school types.

The **Logic Model** for *Building on Success for Future Excellence* will support improving Idaho’s overall K-12 education for Idaho families and students through the following:

## Project Logic Model for Idaho's *Building on Success for Future Excellence* Proposal

Inputs & Resources	Activities	Outputs	Short-term Goals	Mid-term Goals	End Goals
<b>Objective 1: Increase the number of quality Idaho charter school seats by no less than 5,900 students</b>					
Bloom, JKAF, Idaho authorizers, Idaho SDE, and other partners as appropriate	Bloom & state partners announce Building on Success for Future Excellence subgrant project & statewide training sessions	Subgrants awarded to highest quality applicants to launch/expand quality charter schools while helping to improve Idaho's public education sector, but especially the overall charter school sector	By 2026, 5 competitive large school subgrants (enrollment 300+) and 1 small school subgrant (enrollment <300) will have been awarded.	By 2028, 10 competitive large school subgrants (enrollment 300+) and 3 small school subgrants (enrollment <300) will have been awarded.	Increase the # of high quality charter school seats available to Idaho students to no less than 5,900 students by successfully awarding & administering 10 large school subgrants and 3 small school subgrants.
	Bloom runs rigorous competitive RFP process to solicit high quality subgrant applications				Subgrantee charter schools' student mix will be <5% of state averages for non-white, ELL, special needs & economically disadvantaged
	Bloom contracts with expert partners to share best practices & provide technical assistance on an ongoing & regular basis				
<b>Objective 2: Support quality authorizing while disseminating &amp; supporting best authorizing practices statewide</b>					
Bloom, PCSC, State Department, district authorizers & external experts	Bloom coordinates & contracts with external experts to provide high quality TA & support to the PCSC & other public charter school authorizers (eg school districts)	Idaho authorizers expand their capacity to authorize more quality charter schools.	Idaho authorizers expand the state's portfolio of charter schools by 2 to 3 schools annually	Idaho authorizers expand the state's portfolio of high performing schools by at least 13 schools	Increased percentage of charter schools authorized in Idaho are identified as quality/or improving
	Authorizer evaluation report is coordinated with national authorizing experts	Outside experts generate an authorizer evaluation report and roadmap as a baseline for improving Idaho's authorizing efforts	Bloom, in collaboration with outside experts, share best practices and technical assistance widely with the PCSC and district authorizers	PCSC and district authorizing improves	Idaho's lawmakers, authorizers & the charter school community overall better understand the roles & responsibilities of quality authorizers and why this matters for students, schools and the state
	Workshops in 2024, 2025, 2026 & 2027 are organized for PCSC, district authorizers, & possibly university authorizers	Workshops are developed and delivered			
<b>Objective 3: Evaluate &amp; disseminate widely successes and lessons to impact the broader education system</b>					
Bloom, JKAF, SDE & external experts	Bloom coordinates with the state & external experts the collection & analysis of student outcome data for all subgrantees	Bloom coordinates annual 3-party review of the CSP programs	As a group, subgrantees meet or exceed state academic achievement targets	As a group, subgrantees decrease the academic achievement gap between historically underserved students & state averages	Increased academic outcomes for students attending Idaho charter schools
	Evidence-based best practices identified & shared	Bloom hosts annual best practices conference	As a group, subgrantees meet or exceed state academic growth targets		Increased academic outcomes for all Idaho students
	Bloom contracts with expert partners to conduct student, parent & community focus groups & survey work to share their insights & lessons	Research & evaluation identifies best practices & opportunities for future growth			Historical achievement gaps among Idaho students are reduced
		Parents & communities feel engaged in creating & supporting charters			Greater awareness around charter schools & their overall performance in Idaho

## 2) Objective Performance Measures

Idaho's *Building on Success for Future Excellence* proposal has three primary objectives and associated performance measures for each that follows:

**Objective 1:** Increase the number of quality Idaho charter school seats by no less than 5,900 students, especially for our most educationally disadvantaged and rural students.

**1.a:** *CSP subgrantee approved seats will grow by, on average, 1,180 students annually, as measured by Idaho State Board of Education approved authorizing entity's performance certificates.*

**1.b:** Subgrantee demographics as a whole will be within 5% of the state averages for non-white students **annually**, as measured by the Idaho SDE data.

**1.c:** Subgrantee demographics as a whole will be within 5% of the state averages for ELL students **annually**, as measured by the Idaho SDE data.

**1.d:** Subgrantee demographics as a whole will be within 5% of the state averages for special needs students **annually**, as measured by the Idaho SDE data.

**1.e:** Subgrantee demographics as a whole will be within 5% of the state averages for economically disadvantaged students **annually**, as measured by the Idaho SDE data.

### **SMART GOAL STATEMENT 1.1**

Awarded grant monies will expand the number of charter school seats in Idaho, from about 30,000 to over 36,000 (by about 6,000) over five years.

### **SMART GOAL STATEMENT 1.2**

Subgrantee charter school demographics will be not less than 5% of state averages for non-white, ELL, special needs, and economically disadvantaged students.

**Objective 2:** *Support quality authorizing in Idaho while disseminating and supporting best authorizer practices statewide.*

**2.a:** 85% of subgrantees outperform district averages in the aggregate and among all educationally disadvantaged student groups on 4<sup>th</sup> and 8<sup>th</sup> grade ELA and Math assessments, as measured by Idaho SDE data.

**2.b:** Median Growth Percentiles on 4<sup>th</sup> and 8<sup>th</sup> grade ELA and Math for educationally disadvantaged students attending subgrantee charter schools increase **annually**.

**2.c:** For subgrantee schools serving 100% at-risk students, 85% of graduates will go on to employment, post-secondary education or to the military.

**2.d:** For subgrantee schools serving 100% at-risk students, 85% will graduate high school within 5-years.

**2.e:** In partnership with the National Network for District Authorizing (NN4DA) hold an **annual** awareness and improvement training session for district and interested district authorizers.

**2.f:** Bluum will hold at least one dissemination event and at least one best practice technical assistance event, **annually**, for all state approved authorizers.

**2,g:** Bluum will provide, likely in partnership with a national expert like the National Charter Schools Institute, direct technical assistance support to the Idaho Public Charter School Commission in its efforts to improve its authorizer operation and oversight system.

### **SMART GOAL STATEMENT 2.1**

Increase the number of school districts serving as quality authorizers by at least three.

### **SMART GOAL STATEMENT 2.2**

Increase the % of charter schools in authorizer annual reports with overall scoring in “Good Standing” or higher.

**Objective 3:** *Evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education systems.*

**3.a:** Achievement data for students attending Idaho charter schools, will meet or exceed the ESSA defined targeted achievement for all Idaho schools **annually**, as measured by Idaho SDE data for the ISAT (Idaho Standard Achievement test).

**3.b.** Achievement data for non-white students attending Idaho charter schools, will meet or exceed the ESSA defined targeted achievement for all Idaho schools **annually**, as measured by Idaho SDE data for the ISAT.

**3.c:** Achievement data for ELL students attending Idaho charter schools, will meet or exceed the ESSA defined targeted achievement for all Idaho schools **annually**, as measured by Idaho SDE data for the ISAT (Idaho Standard Achievement test).

**3.d:** Achievement data for special needs students attending Idaho charter schools, will meet or exceed the ESSA defined targeted achievement for all Idaho schools **annually**, as measured by Idaho SDE data for the ISAT (Idaho Standard Achievement test).

**3.e:** Achievement data for economically disadvantaged students attending Idaho charter schools, will meet or exceed the ESSA defined targeted achievement for all Idaho schools **annually**, as measured by Idaho SDE data for the ISAT (Idaho Standard Achievement test).

### **SMART GOAL STATEMENT 3.1**

Increased academic outcomes for students attending Idaho charter schools as determined by meeting or exceeding student achievement targets for 4<sup>th</sup> and 8<sup>th</sup> grade ELA and math as set by Idaho's ESSA plan.

## SMART GOAL STATEMENT 3.2

Increased academic outcomes for students attending Idaho charter schools as determined by meeting or exceeding student growth targets for 4<sup>th</sup> and 8<sup>th</sup> grade ELA and math as set by Idaho's ESSA plan.

### *3) Ambitiousness of Project Objectives (a)(8)*

The ambitiousness of the objectives and performance measures outlined above is self-evident considering Idaho's pressing growth in student population, changing demographics and ongoing performance gaps. The ambitiousness of this proposal is also based on the previous 5-years of Idaho's successful implementation of its ambitious 2018-23 CSP grant, and the lessons learned from it. Our three objectives highlighted above reflect the fact that as a sector Idaho's public charter school academic performance and growth continues to outpace that of state averages even as we continue to add schools and students. See Table 1 above.

In seeking to add another 5,900 students to our charter school enrollment over the next five years after adding an expected 11,467 new school seats the previous five years we are taking heed of the much higher costs associated with launching public charter schools in the mid-2020s versus the late 2010s. Inflation has made the costs of successfully opening and running schools significantly higher. Consider the cost of a 77-passenger diesel bus. In 2019, CSP funded subgrantees in Idaho could purchase a bus for \$89,425. This same bus in 2023 costs \$132,400. Further, this proposal, if funded, would support Bluum's efforts to provide TA and PD opportunities for not only new subgrant schools, but also for those schools that received CSP funding previously. And, the lessons learned from this project will build on the lessons of the earlier CSP grant to continue influencing state policy and efforts to improve not only the overall charter school sector, but also the state's traditional public schools.

It is critically important to note that the \$22 million *Communities of Excellence* CSP grant administered by Bluum leveraged and built upon significant support from JKAF as well as from other philanthropic charter school supporters. As Figure 1 demonstrates our ambition to support high-quality charter school growth in Idaho exceeds the scale and support of the proposed CSP grant alone. This will continue in 2024 and beyond.

**Figure 1: Bluum’s Investment Summary 2015-March 2023**



#### **4) Evidence of Demand and Need (a)(8) part II**

The evidence of demand for new school seats in Idaho, especially those that can help serve our needier and rural students, is captured anecdotally in quotes like the one from superintendent Scott Woolstenhume in eastern Idaho: “What I love about Elevate (charter school) is that they are not concerned about being a top-ranked school in the state, or competing with district schools for students,” he said. “They are focused on the kids that really need them and that, candidly, are struggling in our schools.”

Moving beyond anecdotes to quantitative data, Table 4 below shows how Idaho’s public charters perform vs. statewide averages vs. Idaho’s proficiency targets as shared in *Idaho’s Consolidated State Plan* approved by the USDe in 2019.

**Table 4: ID’s Student Proficiency Statewide & Charters vs. Approved Targets (2020-21)\***

	All Students			Economically Disadvantaged			Minority		
	Charter	Statewide	State Target	Charter	Statewide	State Target	Charter	Statewide	State Target
ELA Proficient	62%	55%	66%	50%	40%	57%	47%	38%	56%
Math Proficient	50%	43%	58%	36%	28%	50%	32%	24%	44%

\*All data come from the Idaho State Board of Education

Both Idaho charters and public schools statewide fell short of our approved student proficiency targets in 2020-21. Some of this is the result of COVID-19 and school closures. But, as with the NAEP data shared earlier Idaho’s public charter schools outperform our traditional schools and, importantly, this is true for both our Economically Disadvantaged and Minority Students.

**Serving neediest students well (a)(1)(vii):** In February 2023, Bluum hosted the research team (Macke Raymond and Lynn Woodworth) from Stanford’s CREDO to share state level findings from their *National Charter School Study* with the Idaho State Board of Education. CREDO is known nationally as the “charter school analysis people.” Idaho is one of 30 states that will be in their national study. Their February briefing in Boise was the first provided any state. Key takeaways from the 2023 Idaho CREDO as was reported by *Idaho Ed News* include:

*Idaho’s special education students are doing notably well in charter schools. “Idaho’s special education results are among the best that we’ve seen nationally,” Raymond said. “We normally see a much larger offset of learning in the special education community.” Similarly, Idaho’s students in poverty are doing as well at charter schools as they are in traditional schools, which is rare. “There is an overall best practices emerging from the picture that we see over time in Idaho that we think actually could be important for other charter school communities around the country to look at, particularly in poverty and (special education),”*



*Raymond said.* Idaho's charter schools have proven effective at redressing the state's glaring opportunity gaps.

As noted under **The Rational** for this proposal, Idaho is a rapidly growing state and we need new school capacity to serve our expanding student population. Our growth is statewide and is fastest among our rural and Hispanic students. Rural counties grew 2.3% in 2022. The 2022 US Census population estimate showed that three North Idaho rural counties were among the top five with the highest growth rates from 2021 to 2022.

**Idaho's student population is also growing in diversity and needs.** The fastest growing student demographic in Idaho is Hispanic students. According to the Idaho Commission on Hispanic Affairs, "Hispanic students made up 18% of K-12 enrollment in 2019-20, but accounted for 31% of enrollment growth in the previous five years. From 2014-15 to 2019-20, Hispanic enrollment increased 12% and non-Hispanic enrollment increased 5%."

In Idaho, public charter schools are an important part of improving learning opportunities for our Hispanic students and giving families more and hopefully stronger education choices. We know Hispanic families are choosing public charter schools: in Caldwell, for example, 72% of students who attend Elevate Academy Caldwell (a 2019 CSP grant recipient) identify themselves as Hispanic. Data from the Idaho State Board of Education shows the percentage of Hispanic students in Idaho public charter schools has grown from 11.4% in 2016-17 to 16.7% in 2022-23.

Idaho's public charter schools have reduced the gap with state averages in percentages of Hispanics served from 18.4% to 11.4% in 2016-17 to 19.2% to 16.7% in 2022-23. These statistics evidence that there are now hundreds more Hispanic students attending public charter schools than there were just six years ago. This growth in Hispanic charter school enrollment has

occurred primarily in charters that received competitive 2018-23 federal CSP grants administered by Bluum.

To help gauge the needs of Idaho’s Hispanic families with children – our largest minority group and fastest growing Idaho student demographic – and how our public schools (district and charter) can better meet their needs Bluum-funded and commissioned, with support from JKAF, the report *Here to Stay (2023): Hispanic Parents Talk About Schools and Life in Idaho* (see Attachment 7). This was a follow-up to the 2016 report *Hispanic Parents Speak Out. Here to Stay* was based on five focus groups with Hispanic parents conducted in Fall 2022, one each in Idaho Falls, Twin Falls and Payette, and two in Nampa (one of which was conducted in Spanish). A total of 45 parents were interviewed. To prepare for the focus groups 11 in-depth telephone interviews were conducted with leaders in Idaho’s statewide Hispanic community. The report was produced in both English and Spanish and shared widely. It had the support of Idaho’s leading Hispanic organizations including: the Idaho Migrant Education Program and the Community Council of Idaho.

**Providing stability and professionalism.** To thrive academically and avoid falling behind, children first need stability. Our charter schools build upon proven school models that have been vetted in other communities. They are well-managed and well-run by professionals and a growing number are part of a network. Students who attend Idaho charter schools can thrive without fear that the school will go out of business next year, leaving parents and school systems to scramble and students to readjust to a new school. Our do-no-harm strategy relies upon proven school models and outstanding educators that avoid adding to educational inequities and setbacks.

*Supply of High-Quality Charter Schools.* The expected number and cadence of subgrant awards for this CSP grant proposal is based on lessons learned over the last five years as Bluum administered its \$22 million CSP grant. It is also informed by the recognition that opening new schools in Idaho costs significantly more than it did just five years ago. We awarded 28 subgrant public charter schools during the 2018-23 period (see Attachment 8). The average grant award across the 28 subgrant schools was \$722,321. This CSP proposal for 2024-29 seeks to fund about half that number of subgrantee charter schools at \$2 million for ten schools, and \$800,000 for three smaller, likely rural or expansion, school awards. Bluum has conducted an analysis of the pipeline of high-quality charter school operators in Idaho seeking to offer additional seats to educationally disadvantaged and rural students.

As seen in Table 5, we are forecasting a total of 13 subgrant awards. Ten of these will be for new startup schools serving more than 300 students and likely grades K-12 or CTE schools serving grades 6-12. We expect three subgrantee schools to be either smaller rural schools or smaller expansions of existing schools that may add additional grades. Both approaches would serve less than 300 students.

**Table 5: Total Estimated Subgrants (2024-2028)**

Award Type	2024	2025	2026	2027	2028	Totals
New >300 students	2	3	3	2	0	10
New <300 students	1	1	1	0	0	3
<b>Totals</b>	3	4	4	2	0	13

Idaho's current new school pipeline consists of both high-performing endogenous nonprofit operators (see letters of support) seeking to launch new schools and external operators for whom the availability of start-up funding would enhance their interest in launching a school or schools. **Note**, under Idaho law there are no real operational differences between start-up charter schools and charter school replications. Each type is required to be their own LEA, each is required to have their own 501c3 status, each is required to have their own charter agreement

and performance certificate with a state-approved authorizer, and each is required to have their own separate and distinct budgets and annual audits. We do see the possibility of one or two expansions in our pipeline, but these would be for less than 300 students. Therefore, we are expecting 10 “new” startup schools of more than 300 students and 3 smaller subgrants for startups or expansions. The schools over 300 students will likely be associated with existing nonprofit, Idaho-birther and based, charter school networks.

We know, in fact, that there will also be more applicants than subgrant awards issued. We also suspect that for-profit charter management organizations from outside of Idaho will seek CSP grant awards. Based on the performance and low enrollment of the handful of for-profit managed schools currently operating in Idaho we are skeptical of their viability for this grant program. **Bluum is attuned to the 2022 NFP.** We believe that having a high bar for subgrantees and real competition for awards will more likely align our efforts with the 2022 NFP by promoting greater fiscal and operational transparency and accountability for CSP-funded charter schools.

Increased competition for subgrants that are of significantly larger dollar amounts (up to \$2 million from \$800,000) than in previous years will also encourage the continuing efforts of our nonprofit charter operators to open schools that strategically promote positive student outcomes, educators and community empowerment, promising practices and schools that are diverse by design. We believe the larger subgrant dollar amounts will incent hesitant school districts to pursue both authorizing opportunities with high-performing school networks, and even the possibility of launching charter schools of their own targeting needier and currently underserved student populations (eg see above RISE charter school).

**Sharing best practices (a)(1)(ix):** In preparation for this CSP grant proposal Bluum asked researchers at the FDR Group to reach out to some of Idaho's district leaders about the potential for collaboration between traditional district and charter schools (see attachment 5). Two insights from those conversations with traditional district superintendents across Idaho are particularly important to this CSP Proposal:

- 1) The insight that the charter school model – whether authorized by the district or by outside entities – makes it easier to open innovative schools with specific themes.
- 2) A broad belief that charters can enhance the collective good of communities by offering families more options to match students who have different learning styles and interests.

As noted previously in the Investment Summary graphic above, JKAF is a quality-conscious philanthropic funder of Idaho public charter schools and their support will also be available for most, if not all, of the schools approved under this proposal for CSP subgrant support (see letters of support). JKAF is also the primary funder of the Idaho New School Fellowship, which has 23 current alumni, and serves as the pipeline for school leadership talent into likely CSP-funded charter schools.

**This demonstration of a cohesive statewide system (a)(2)(ii)** is manifestation of alignment among public and private entities ensures a significant pool of quality school operators and educators intent on seeking approval to open high-quality charter schools. Idaho's existing homegrown nonprofit charter operators have a proven record of improving student learning outcomes for all students; especially for economically disadvantaged, minority and underserved-rural students. Idaho public charter schools do not face geographic limitations on where they can open under state law. They are open-enrollment schools, must serve all students and if they are over-enrolled they are required to conduct a public lottery to determine enrollment. Idaho public

charter schools must comply with all federal and state rules and regulations as it relates to special education, testing requirements and financial accounting and reporting.

**Working to develop cohesive strategy (a)(2)(iii) & encourage collaboration**

**(a)(2)(iii):** Over the last five years Bluum provided best in class TA for not only CSP funded charter schools but for all charters and interested district and even private schools. These included trainings on issues of school safety, special education, Civil Rights in Public Charter Schools Conference in 2019 and 2022, Response to Intervention (RTI) training, board trainings and 34 different trainings for specific partner schools. To provide this support Bluum contracted, through a competitive bid process, with state and national partners like Civil Rights Solution, Education Board Partners, Insignia Partners, Lee Pesky Learning Center, National Alliance for Public Charter Schools, Noble Story Group, Relay/GSE, Teach Like a Champion, The Together Group and Uncommon Schools.

Bluum's staff includes expertise on school finance, special education, academics and school leadership, school governance and school facility financing. This talent is made available free of charge to the Idaho CSP grant program and subgrantee schools through the generosity of JKAF. Bluum used 2018-23 CSP grant support to also generate research beneficial not only to Idaho charter schools but to the charter sector nationwide. This included: *Charter School Governance: The Essential Guide Videos* and *Charter School Facility Refinancing Guide & Toolkit* in partnership with the Charter School Facility Center at the National Alliance for Public Charter Schools (see Attachment 9). **Should Bluum receive funding under this 2024-29 CSP grant proposal we will continue to generate expertise, TA/PD and research that benefits not only education in Idaho, but school improvement efforts across the country.**

## B. QUALITY OF ELIGIBLE APPLICANTS RECEIVING SUBGRANTS

### 1. *Experience Counts When It Comes to Launching Quality Charter Schools*

Bluum's continuing work to grow Idaho's public charter school sector with quality builds on: a) the lessons learned by Bluum over the last five years from administering our *Communities of Excellence* CSP grant and selecting 28 schools for subgrant support; b) lessons learned from across the country as we have evaluated charter school quality and how to get more of it; and c) the lessons from Idaho's 25-years of charter schooling. First, a point of humility is needed. No matter how well-crafted and designed a third-party review process for determining subgrant awards might be there is apt to be some failures. Our goal is to minimize the risk of failure by having the appropriate upfront rigor per what to review (the design) and having well-aligned and well-trained third-party reviewers doing the reviews.

### 2. *The Design – Bluum's Subgrant Application Process*

**Inform eligible charter schools (a)(1)(ii):** Based on our experience of helping launch and support 28 charter schools under our previous CSP grant, Bluum has designed and refined a rigorous and transparent subgrant application and review process that will ensure to the highest degree possible that CSP funding is directed toward high-quality charter operators equipped to enhance and improve the overall quality of our state's educational landscape. Idaho has a number of these types of schools and homegrown networks that are serving students well while serving diverse student populations. We will work to encourage and help those operators that are capable and willing to apply for subgrantee support. We call this: **building on success**.

Figure 2 depicts how the annual subgrant competition will be structured from program announcement to announcing awards.

**Figure 2: Bluum’s Subgrant Application Process & Tentative Timeline (Competition 1)**



**Subgrant Availability (a)(3)(i):** Bluum will maximize its range of communication channels and partners to publicize the CSP subgrant opportunity widely. Information about the funding opportunity will be posted on Bluum’s website for 24/7 access. Bluum will share via its social media network, the Idaho Charter School Network and the partner networks of groups like the ID State Department of Education, the ID State Board of Education, the Charter School Growth Fund and the IPCSC and other state-approved charter school authorizers.

Bluum is already communicating with nonprofit charter school network operators in Idaho and beyond that have expressed interest in possibly applying for CSP grant funding. Should Bluum be awarded a CSP grant for 2024-29 these groups will be made aware of the opportunity, as will interested Idaho school districts. We expect more applicants than we will be able to fund. We believe this competition for awards will improve the quality of our ultimate awardees.

**Peer Reviewers (a)(3)(i):** During the last five years Bluum has developed a stable of quality peer-reviewers. Our review team has been led by the retired (living in Idaho) long-time Louisiana charter school network leader Colleen Mackay. Our peer review bench includes



former Idaho charter leaders, former state education policy leaders, and out-of-state charter leaders and educators who we've gotten involved in Idaho over the years through our staff's collective professional networks and/or serving as reviewers for earlier CSP competitions. We will continue to advertise opportunities to serve as peer reviewers through our networks and partnerships with groups like the Idaho School Boards Association, the National Alliance for Public Charter Schools, PIE-Net, Charter School Growth Fund and the National Charter Schools Institute. As we did for our previous CSP project, Bluum will provide training for all peer-reviewers before each and every subgrant competition to ensure that reviewers are well-aligned to the goals of our program and our well-trained in the expectations within our rubric.

**Eligibility Review (a)(3)(i):** In order to be eligible for CSP subgrant funding the applicant **must have an approved charter** from the Idaho Public Charter School Commission, an Idaho school district authorizer or from a public college or university approved by the State to authorize schools. Evidence of the approved charter agreement **must be submitted** to Bluum as part of their CSP grant application. This process will ensure that all interested applicants are providing documentation verifying that they have received authorization to open or replicate a high-quality charter school as defined in ESEA code 4310(8). The Bluum CSP team will review the approved charter petition, including budgets, to ensure the applicant is in good standing with its authorizer and to ensure the prospective **subgrantee is proposing a sustainable and high-quality charter school** committed to serving all students, especially our needy, rural and at-risk students. Again, evidence of an approved charter agreement will occur before Bluum extends an invitation to respond to the full RFA.

**RFA Response (a)(3)(i):** Interested applicants that have been assessed as eligible by Bluum will be invited to respond to the full Bluum RFA. Bluum has a USED approved RFA (see

Attachment 10) from 2018 that it has refined and modified over the last five years as we have received feedback from subgrantees and from our USED technical assistance providers such as Manhattan Strategy Group and WestEd. As we have in prior years, our RFA will be iterated prior to each competition cycle based on feedback from applicants and peer reviewers, and will consist of narrative responses, a budget proposal and supporting documentation. Our new version of the RFA for 2024 and beyond will build on our 2022 revised RFA.

**It will lead with the federal definition of a charter school (ESEA code 4310) and incorporate the updates required pursuant to the 2022 NFP.** We understand the precise structure, phrasing, and weighing of the RFA will be finalized prior to each competition cycle, and all material modifications to the RFA will be cleared with USED prior to publication.

**Table 6: Draft RFA Rubric Framework for Narrative (a)(1)(xiii), (a)(3)(i) & (a)(3)(ii)**

Section 1: Grant Project Goals	
<ul style="list-style-type: none"> <li>Identify 2-4 SMART Grant project goals and justify each goal in terms of its value in supporting the planning and implementation of the proposed school.</li> </ul>	
Section 2: Educational Philosophy, Instructional Practices & Curriculum	
<ul style="list-style-type: none"> <li>Mission &amp; Vision for the School</li> <li>Describe and justify the design of the academic program in terms of the educational philosophy, instructional practices, and curriculum that will be utilized to meet the school's performance objectives. Include key design elements, references supporting its validity and alignment to state and federal requirements, and rationale for why this education model was chosen and how it will produce strong outcomes for the unique community and student population the school will be located within.</li> <li>Consistent with the definition of a charter school in ESEA code 4310, the school justifies how key elements have been chosen to utilize autonomies and flexibilities granted to charter schools under state statute to create programs that meets the unique needs of the school's anticipated demographics.</li> </ul>	
Section 3: Teaching and Learning	
<ul style="list-style-type: none"> <li>Describe and justify the design of the instructional strategy in terms of the educational philosophy, instructional practices, and curriculum that will be utilized to meet the school's performance objectives. Include key design elements, references supporting its validity and alignment to state and federal requirements, and rationale for why this strategy was chosen and how it will produce strong outcomes for the unique community and student population the school will serve.</li> </ul>	
Section 4: Student Academic Achievement Standards	
<ul style="list-style-type: none"> <li>Charter schools need to ensure plans, systems, and tools for strong oversight and monitoring in the areas of academic performance. Persuade the reader that your school</li> </ul>	

will have rigorous goals and adequate oversight to ensure quality implementation, operation and accountability.

### Section 5: Student Demand & Community/Local Support/Family Engagement

- Needs analysis for the school and recruitment strategy.
- Schools funded under the CSP subgrant must ensure they are in tune with their communities' needs and priorities. Schools will document their vitality and long-term sustainability through demonstrating their dedication to developing and maintaining community partnerships and connections.
- Per 2022 NFP, describe how the project includes a community-centered approach for meaningful family engagement.

### Section 6: Effectively Serving All Students

- Public charter schools are obligated to take specific actions to ensure an open, fair, non-selective method of attracting and enrolling students, and all charter schools need to be ready to serve the group of students that chose to attend. Describe the plan to offer a continuum of services for all types of students, including those that are educationally disadvantaged (such as low-income, special education, English Language Learners, homeless, migrant and other at-risk students) and gifted and talented.
- The school identifies a **plan that meets the transportation needs** of its projected and/or current student population. (a)(5)
- The school identifies a **plan that meets the nutritional needs** of its educationally disadvantaged and at-risk students. (a)(7)

### Section 7: Staffing & Professional Development Plan

- Describe the approach to staffing, inclusive of ratios, portions, etc. required for effective implementation of the chosen education model. Further, describe in the process in which all staff will be supported in their ongoing professional development.

### Section 8: Financial Management & Monitoring Plan

- Charter schools are fully responsible for ensuring quality financial management practices and ongoing financial stability. Explain your school's plan to be compliant, strategic, and responsible for business services.
- Describe how school will ensure a viable, well-conceived facilities plan.

### Section 9: Board Capacity & Governance Structure

- A competent, trained governing board is essential to the success of a public charter school. Demonstrate how it has developed a strong governing board with a diverse set of skills. Board members should understand their roles and responsibilities and have in place a transition plan and ongoing professional development to maintain board strength going forward.

### Section 10: School Leadership & Management

- Describe school leadership team and management structure.

### Section 11 (if applicable): CMO Description, Roles & Responsibilities

- Describe roles and responsibilities of governing board vis-à-vis for-profit management company.
- Describe the business or financial relationship between the charter school developer and the management organization.
- Describe how you will ensure the members of the governing board of the charter school are not selected, removed, controlled or employed by the management

organization and that the charter school's legal, accounting and auditing services will be procured independently from the management organization.

### Section 12: Competitive Preference Priorities (a)(3)(iii)

- Schools that articulate a plan to serve and intentionally meet the unique needs of students in rural geographic areas.
- **Schools with a high school program. (a)(1)(xiii)**
- Schools intentionally meeting the needs of a student population of more than 50% economically disadvantaged students.
- Schools collaborating with at least 1 traditional public school or traditional district.
- Evidence of local support (eg free or reduced price land) and/or philanthropic support (eg grant support).

**Budget Narrative (a)(3)(i):** All subgrant applicants will be required to complete both a budget spreadsheet and a budget narrative. In the budget applicants will be required to itemize all proposed costs (with planning and implementation periods broken out) within each budget category and to provide sufficient information for peer reviewers to determine if the expenses are reasonable, allocable, sustainable and necessary. The budget narrative provides the applicant the opportunity to justify budgeted expenses by connecting them to the SMART Grant project goals they serve.

**Supporting Documents (a)(3)(i):** All subgrant applicants will be required to append a series of attachments in concert with their submission packages, which includes the budget spreadsheet and narrative described above. In addition to an approved charter agreement from an approved Idaho charter school authorizer, applicants will be required to submit some or all of the following in Table 7:

**Table 7: List of Required Supporting Documents (a)(3)(ii)**

- |   |
|---|
| • Successful completion of Eligibility Requirements Questionnaire                               |
| • Signed statement form affirming the reading of the entire RFP document                        |
| • Compliance Checklist of Certifications and Assurances signed by school leader and board chair |
| • SAM.gov registration  |
| • 990 forms & and Secretary of State Filings (if available)                                     |
| • Lease or Real Estate Agreements (or drafts)   |
| • Facility Financing Letter from Lender (or drafts)   |

<ul style="list-style-type: none"> <li>• Philanthropic Letters of Support (if available)</li> </ul>
<ul style="list-style-type: none"> <li>• Self-Risk Assessment (reviewed &amp; finalized with Bluum’s risk assessment)</li> </ul>

**Capacity Interview (a)(3)(ii):** Prior to providing application packets to the 3<sup>rd</sup>-Party Peer Review Team, Bluum’s grant management and finance teams hold a document check and reviews the RFA submitted and the subgrantees approved charter agreement to answer the following:

- Do submitted documents match their descriptions (budgets are budgets, etc.)?
- Where templates are required are the correct templates used?
- Has the school identified an appropriate Internal Fiscal Contact?
- Is the budget narrative complete and does it correlate with the budget sheet?
- Are there any disqualifying factors for eligibility?
- Has the applicant been approved by an Idaho approved charter school authorizer?
- Is the school managed by a for-profit management organization (including a nonprofit management organization operated by or on behalf of a for-profit entity)?

Applicants are told to be available during the application period and after submission for any questions from the Finance Team during this Document Check. This is the first step interacting with applicants that provides potential technical assistance or risk monitoring needed upon award.

**Application Review (a)(3)(i):** At the beginning of a CSP subgrant cycle, a Request for Qualifications is sent to pre-qualified potential Peer Reviewers. Bluum’s peer review team consist of members that possess relevant experience in charter school operation, governance, authorization, finance, administration, leadership, and law, including individuals from diverse backgrounds and underrepresented groups. Peer Reviewers receive a small stipend for each

application reviewed. The Peer Review Manager will collect completed Conflict of Interest forms from the Peer Review Team to disclose any actual or perceived conflicts. All subgrant applications will be scored by three reviewers. As eligible applicants are completing their subgrant proposals, Bluum will host a mandatory training for Peer Review Team members and is ultimately responsible for overseeing and monitoring the Peer Review process.

Bluum Grants and Finance Team will hold a training to review the Idaho charter school landscape, the objectives of the Idaho's *Building on Success* CSP grant, the application, and the scoring rubric. This session will include a review of the CSP Allowable Cost Guide (see Table 8), as well as a detailed explanation of how reviewers will be expected to assess subgrantees proposed use of charter school program funds. For example: alignment to project goals, post grant period sustainability, and overall reasonableness, necessity, and allocability of expenses. The Federal Register specifies the allowable expenses that may be funded through a federal CSP subgrant.

**Table 8: Allowable Cost Guide Summary (a)(3)(i)**

Allowable expenses include one or more of the following:
(a) Preparing teachers, school leaders, and specialized instructional support personnel, including through paying costs associated with – (i) Providing professional development; and (ii) Hiring and compensating, during the eligible applicant’s planning period specified in the application for funds, one or more of the following: (A) Teachers. (B) School Leaders. (C) Specialized instructional support personnel.
(b) Acquiring supplies, training, equipment (including technology), and educational materials (including developing and acquiring instructional materials).
(c) Carrying out necessary renovations to ensure that a new school building complies with applicable statutes and regulations, and minor facilities repairs (excluding construction).
(d) Providing one-time startup costs associated with providing transportation to students to and from the charter school.
(e) Carrying out community engagement activities, which may include paying the cost of student and staff recruitment.
(f) Providing for other appropriate, non-sustained costs related to opening, replicating, or expanding high-quality charter schools when such costs cannot be met from other sources.



The expense coding guidance provided to sub grantees by Bluum will clearly define allowable and unallowable expenses (i.e., food and drink, management fees, professional dues and membership fees, etc.), list expected accounting policies and procedures, and require schools to comply with all state and federal financial reporting requirements.

Led by the Peer Review manager, the Peer Review Team will participate in an exercise to review sample responses to actual RFA prompts, determine independently how they would score those answers according to the prescribed rubric, and discuss with other reviewers how they arrived at their scores. The Peer Review manager and the Bluum team are available during the entire peer review process to ensure any questions or technical difficulties that arise are taken care of immediately.

Upon completion of the Document Check, Bluum determines Priority Points and passes the Management Approved final scores and supporting documentation to the Peer Review Manager to share with Peer Reviewers to enter into the application software system along with their scoring and comments on strengths and weaknesses. Once vetting and training is completed the Peer Review Manager ensures applications are assigned to three disinterested Peer Review Team members. Grants will be awarded to the applicants that receive the highest scores during each competition cycle, considering they meet the minimum required score and pass Management Review.

**Management Review (a)(3)(i):** Occurs after the Peer Review Manager officially hands off all the completed application packets and Peer Review scores and comments to Bluum's Management Team. Bluum examines the results and determines whether there are any issues that require additional questions or team involvement. Bluum reviews all submitted documents from the finalists and reviews the sum of the requested funds to determine if there are sufficient funds

to grant awards to all scoring over the minimum allowable score, or if, ranked by score, lower-ranking applicants receive reduced or no awards. Bluum will evaluate whether the highest rated applicants under the minimum should be considered for funding, depending on the availability of remaining funds. During this review, the following are evaluated and documented:

- Areas that require additional monitoring or correction before final award, ensuring that the report from this management review includes providing conditions or corrective actions necessary before the spending authority is granted. Bluum mirrors the Federal process where we may award an amount, but document contingencies that must be satisfied before the school can start spending funds.
- Final decision on awards and amounts.
- Technical Assistance needs (eg - feedback on program design); if the school has a significant need (eg lots of ELL students) but the academic plan and budget plan do not appear to adequately address this need.

This review process is the starting point for customizing the Grant Award Letter, which needs to document any special requirements, conditions, or benchmarks we want to ensure are written into the Individual Grant Plan.

**Finance Budget Review (a)(3)(i):** Occurs along with the management review and looks at issues such as: supplant vs. supplement; Allowable vs. Unallowable Costs; Grant funding timeline and totals match available funds. At this stage we also document any technical assistance needs. The number of awards during each grant cycle will be predicated on the availability of funding. Bluum will post on its website a detailed breakdown of subgrantees and award amounts.



## **C. STATE PLAN**

### **Monitoring Eligible Applicants Receiving Subgrant (a)(1)(vi)**

Bluum over the last five years, and through the generous support of the J.A. and Kathryn Albertson Family Foundation, and with administrative funds from our 2018 *Communities of Excellence* CSP grant, has built a Boise-based team of charter school experts fit to monitor, assist and take action as necessary for the benefit of our subgrantee charter schools and students. We do this work not only for the CSP grant, but also for JKAF and other philanthropists who utilize the Bluum team expertise to help facilitate their Idaho grantmaking for public charter schools and school reform efforts more generally. The Bluum team will engage in a range of thorough and differentiated monitoring activities designed to ensure all subgrantees are implementing with fidelity the activities described in their approved applications, are meeting their project goals, and are adhering to federal rules and regulations. Through its monitoring and TA activities Bluum will work to ensure that subgrantee schools that receive CSP funds meet the educational needs of their students, including children with disabilities and ELL students.

This monitoring will also be supplemented by the work carried out by state approved charter school authorizers that under state law are required to issue annual charter performance reports on the schools they authorize. The charter performance reports are public documents, and they are available on the websites of the Idaho Public Charter School Commission as well as on the website of district authorizers. All annual financial audits are also public documents.

Idaho's performance-based accountability system helps ensure that the state's public charter schools are held accountable for their academic, fiscal and operational performance. The Idaho State Department of Education (SDE) under Idaho statute also plays an important role in this effort, and both authorizers and the SDE have processes and systems in place for monitoring

the fiscal and academic health of schools. It is important to note that *IdahoEd News* annually generates public data and reporting on district and charter school performance through their widely used Idaho Education Data portal. This is a powerful instrument for transparency in public education.

Bluum’s monitoring timeline is provided in Table 9 below.

**Table 9: Monitoring Timeline Table (a)(9)**

Activity	Timeline
Finalize Monitoring Checklist Template in Basecamp	Fall 2023
Skills Update for Monitoring Team: Review latest regulations, guidelines, and best practices in grant monitoring	Fall 2023/Ongoing
Pre-Award: eligibility, required application documents, capacity interviews, self-risk assessment from applicant	Spring 2024/ Ongoing Subgrant Competition
Award: Examine results, document areas for budget modifications, technical assistance, additional monitoring, or conditions on award	Spring 2024/ Ongoing Subgrant Competition
Post Award: Individual Completeness Check with subgrantee, outlining reports, deliverables, and monitoring timeline	Spring 2024/ Ongoing Subgrant Competition
Targeted Financial Review: Requests for reimbursement include all evidence of allowability, reasonableness, and allocability.	Monthly for each current subgrantee
Desktop Review and Site Visit Preparation: fiscal and programmatic	Annually
Site Visits	Annually
Follow Up: technical assistance, training, corrective actions	Ongoing
Performance and Financial Reports	Annually
Final Performance Report and Grant Close Out	Within 90 days of the end of each subgrant

Monitoring activities will be conducted primarily by the Bluum team (see Table 12: Project Lead Team), with outside expertise (eg legal) support when and as needed. Bluum’s team has 5-years of experience managing a previous \$22 million CSP grant. This team is committed to managing this proposed CSP grant with the same rigor and quality demonstrated in its previous CSP grant. Bluum also has longstanding relationships with charter support organizations and research groups like NAPCS, WestEd, Manhattan Strategies Group, Thomas B. Fordham Institute, National Charter Schools Institute, FDR Group, Public Impact and Bellwether. Over

the last five years Bluum has served as a resource for other CSP states including Washington, Connecticut, Alabama, Utah, Oklahoma, Arkansas and Nevada.

Finally, in the state of Idaho the Idaho School Boards Association (ISBA) does a lot of good work on the issue of school governance. Most Idaho charter schools, and this is unique to our state, belong to ISBA and get board governance training from them. Bluum supports and encourages this collaboration and support. As part of our dissemination efforts Bluum has also invested in developing high-quality governance videos under the title “*Charter School Governance: The Essential Guide*.” This video series has been watched by more than 1,500 board members and leaders across Idaho and the country. Dr. Marlaina Palmeri, CEO & President, Superintendent - Cleveland Villaview Community Schools, wrote to us via an unsolicited email in 2022 that, “I have been involved in charter school management since 1998, fortunate to work with some of the most successful charter organizations in the country. This is decidedly one of the best series of presentations to apprise Boards - both new and veteran - on what it requires to uphold the necessary standards of excellence for Board Governance.” A second CSP grant would allow us to do more dissemination activities.

**Monitoring Activities (a)(9):** Note, the entire Bluum CSP process is described in our CSP Playbook (see Attachment 11), which we will update for this proposed CSP grant if we are awarded. Monitoring activities begin during the RFA review process. As described in Bluum’s *Draft RFA Rubric Framework* above, applicants will be required to describe in their applications how they intend to maintain fiscal and programmatic sustainability once their CSP funds have been exhausted. Bluum’s CFO Marc Carignan will assess the credibility of school financial plans and monitor through monthly targeted financial reviews subgrantee financials. Desktop reviews and site visits will happen as needed to track adherence to school plans. Technical assistance will

be provided on an ongoing basis with at least annual site visits scheduled with each school.

Bluum has in-house staff expertise not only in school finance, but also in academics and learning, special education, legal and governance. This expertise is available to this CSP project by the grant support of the J.A. and Kathryn Albertson Family Foundation.

Using state issued data and reports, Bluum will use these seven key indicators for school effectiveness **(a)(1)(vi) & (a)(1)(x)**:

- **Indicator 1** – (For schools serving grades K-8) Are all students (and by subgroups) meeting or exceeding state academic achievement and growth targets in 4<sup>th</sup> and 8<sup>th</sup> grade ELA and math? See *Objective Measures* 3a to 3e above. If not, does the school have viable plans for improving student performance?
- **Indicator 2** – (for schools serving 100% at risk students) Are 85% of graduates going on to employment, post-secondary education or to the military. Are 85% of students graduating high school within 5-years. If not, does the school have viable plans for improving student performance?
- **Indicator 3** – Student Enrollment: Is the school meeting or exceeding enrollment targets? If not, is there a workable plan in place to boost enrollment?
- **Indicator 4** – Fiscal Health: Is the school’s audit clean and are there no defaults on debt agreements? If not, has the school authorizer taken appropriate action to improve/remedy the situation?
- **Indicator 5** – Have there been changes to school leadership/board governance? If so, are replacements high quality, or is there a need to assist in finding appropriate talent?
- **Indicator 6** – Is the school in good standing with its authorizer? If not, is there an agreed to plan for improvements and meeting all compliance requirements?

- **Indicator 7** – Is the school retaining students and staff from year to year or seeing turnover rates beyond those of other CSP awardee schools? If so, what steps are being taken to ensure school stability?

**Technical assistance (a)(9):** All subgrantee schools will receive an onsite monitoring and technical assistance visit within the first 12 months of school operation to ensure activities occur as approved within the grant agreement and for Bluum to gather information regarding technical assistance opportunities and needs. To protect federal dollars, failure to demonstrate progress towards benchmarks and targets may result in the termination of grant and the return of misused or unspent funds. For those subgrantee schools failing to meet expected benchmarks and targets, Bluum in cooperation and coordination with the authorizing agency and state agencies as appropriate, will provide technical assistance to support school improvement efforts. Bluum staff, and outside expertise if needed, will provide ongoing technical assistance for all subgrantees by zoom, email, and in-person meetings to ensure fidelity to the goals of the grant, and to ensure all appropriate accountability and reporting requirements are met.

**Working with Authorizers and State Agencies to Avoid Duplication of Work (a)(9):** Staff time is a precious commodity for all public schools and for all the agencies that support schools. To ensure monitoring and TA under this proposed grant is conducted efficiently, Bluum will work with the IPCSC, district authorizers and state agencies to streamline reporting requirements. When and where appropriate we will also work with state lawmakers, the Idaho Charter School Network, other state partners and individual charter school leaders to reduce unnecessary bureaucracy for public charter schools and for traditional district schools. Rural schools, like one off public charter schools, in particular struggle to manage all the regulatory and reporting requirements thrown their way. Bluum's finance team played a central role in

helping CSP funded charter schools apply for and navigate the ESSER funding demands. Specifically, we provided guidance and support in reporting, monitoring and seeking reimbursements for these federal funds.

Per our proposed CSP grant, if a subgrantee school's progress against stated outcomes is fully evaluated by an authorizer's performance certificate, Bluum will utilize the authorizer's data and information in lieu of a duplicate report from the school. Bluum takes pride in helping to streamline the reporting process for CSP funded schools. We will continue to work on enhancing data sharing efforts to support collaborative efforts and reduce redundancies. This is a process well underway in Idaho for both public charter schools and district schools, and this proposed CSP grant would provide additional incentive to move even faster and smarter on compliance streamlining efforts.

In recent years the Idaho Public Charter School Commission has led the way in trying to develop rigorous application, pre-opening, monitoring, evaluation, and renewal processes for their authorized schools. Their efforts are to be applauded but they still have work to do to improve, specifically embracing and incorporating a charter authorizing management system like the National Charter School's Epicenter. If Bluum receives this proposed CSP grant we will do all that we can – including allocating CSP TA resources – to provide support to the IPCSC and other interested authorizers in upgrading Idaho authorizer data and reporting systems.

Bluum will utilize the data and findings included in school performance certificates (based on state law and state accountability data) to determine whether a school seeking a grant for expansion, or for a nonprofit charter school network or a for-profit CMO seeing to launch a start-up school, meets the NIA's definition of high quality. For first-time subgrantees, Bluum

will help school operators integrate the material and data in their authorizer's application process into Bluum's RFA process where this integration makes sense and is appropriate.

However, it is important to reiterate, Bluum's application process will remain independent and separate to that of charter school authorizers. *No school will be guaranteed a CSP subgrant for the mere fact it has been authorized, nor will an existing high-quality school network be awarded a subgrant if its plans do not satisfy grant application requirements.*

Idaho's Codes 74-201 & 202 subject charter schools to open meetings and access to public records law. Further, 33-5204(2)(C-D) states charter schools must comply with both **open public meetings** and the disclosure of **public records**. Pursuant to 33-5209C, authorized chartering entities "shall continuously monitor the performance and legal compliance of the public charter schools it oversees."

**Technical Assistance and Support (a)(1)(iii):** Bluum provides a wide range of Technical Assistance and Support to its CSP funded schools and will do so under this proposed grant. All of this support is provided *free of charge* to not only CSP funded charter schools but to other partner charter schools and district schools that work with Bluum to improve their education efforts. Following is an example of supports provided to schools in just the last year.

- **For back office:** Regular TA contact with all schools across the Bluum portfolio on school finance issues such as the meaning of new guidance from state department of education.
- **For back office:** providing financial forecasting, managing monthly transactions, supporting board's financial strategic planning, and providing annual audit preparation support and guidance for eleven schools.

- **For back office:** facilities financing and refinancing planning and coordinating for five schools.
- **For special education:** developed a special education resource site is actively being developed to house the charter special education tool kit, monthly newsletters, Related Service Resource Site (a spreadsheet of related service providers willing to work with charters and organized by region), Medicaid resources, and all other shared documents presented in special education specific trainings that have occurred over the last two years (Self, Civil Rights Training, Lee Pesky RTI Toolkit etc.) The site will be ready to launch by the beginning of April.
- **For special education:** partnering with the SELF Fellowship, site visits to schools with exemplary special education programming were completed in January 2023. An outcome of this visit was to implement a model UDL (Universal Design for Learning) classroom with school partners.
- **For special education:** regular TA contact with all schools across the Bluum portfolio on school special education issues such as the meaning of new guidance from state department of education and prep for state special education reviews.
- **For academics:** provided regular coaching and school visits with constructive feedback to more than 25 Idaho school leaders and schools.
- **For academics:** conducted more than 50 hours of high-quality professional development to Idaho school leaders leveraging some of the most respected school leader development programs in the country (all based on the proven practices of some of the highest performing charter management organizations in the country); an average of 20 school leaders participated in each session and nearly all (91%) reported that what they



learned would make them more effective at their jobs. We are seeing exciting gains at schools that have been participating for multiple years, especially for students with disabilities and English learners.

- **For academics:** codified the learning and ensured strong knowledge capture by developing a one-stop-shop landing page at which leaders can access all the materials from all Community of Practice events.

Specifically for this proposed CSP grant, technical assistance will begin prior to eligible applicants receiving subgrants. After receiving the CSP subgrant award, Bluum will coordinate and offer charter school training to ensure that quality charter school developers and operators are able to learn about the opportunity to apply for funding through this project. This project builds on all the work carried out by Bluum in its previous CSP grant and on the ongoing work of the IPCSC, the Idaho State Department of Education and the Idaho State Board of Education.

*New Charter Petitioner Guidance and avoiding duplication of efforts.* Although statute and administrative rule provide information regarding the required contents of a charter petition, petitioners often request additional guidance regarding the scope and nature of information their charters should include. This Idaho Public Charter School Commission guide takes petitioners through the development of a high-quality charter petition in order to maximize their chances of approval (see Attachment 12). **There is no duplication of effort in this area.**

**Pre-Opening Guidance (a)(1)(iii):** The IPCSC's pre-opening guidance includes interactive project management tools, resources, and advice on topics ranging from employee recruitment to governance training, and a series of one-on-one meetings to exchange information and support. **There is no duplication of effort in this area.**

**New School Orientation (a)(1)(iii):** The State Department of Education (SDE) leads a *Charter Start! 101 Workshop*. This is for anyone interested in learning more about the process to start a charter school. Idaho state law requires attendance for any group working on a charter for a new charter school. This annual workshop introduces new charter school operators, leaders and board members to the SDE's federal program officers. These federal program officers explain legal and compliance requirements to new school operators. School administrators that participate in this annual meeting are registered for Idaho's "Consolidated Federal and State Grants Application" (CFSGA) portal. Through this portal charter can apply for federal funds, manage these funds, report on the funds as needed, and certify compliance with all appropriate rules and regulations. Through this training, CFSGA portal, and ongoing process, charter schools can access all federal Title dollars available to their students while ensuring they receive their commensurate share of federal support. **There is no duplication of effort in this area.**

**Work with charters (a)1(viii):** In addition to IPCSC- and state-provided trainings and technical assistance, Bluum will coordinate technical assistance training for prospective subgrantees to address issues specific to the federal CSP grant as described above. Each eligible applicant's submitted budget, which shall include no more than 18 months of planning or a total length of three years, includes a subsequent "sustainability year" for the eligible applicant to demonstrate how it will continue to carry out activities after CSP funding expires. The sustainability budget and accompanying narrative must demonstrate the drawdown of funding through the increased capacity of existing staff. Furthermore, the sustainability budget should demonstrate how other eligible state, federal, and philanthropic funding will be used to support the ongoing needs of the school to ensure a commitment to quality beyond the CSP dollars provided through this project.

Once an eligible applicant receives a subgrant, Bluum will partner with appropriate state agencies, outside experts as needed, and authorizers to provide effective and targeted direct TA to CSP subgrantee schools. Further, each autumn Bluum will coordinate with state partners, authorizers and outside experts as needed in developing and coordinating training that supports charters in their effective implementation of CSP funds and federal programs.

**Technical assistance and support for quality authorizing efforts (a)(1)(xi):** Bluum will work with the IPCSC and district authorizers to assist in the improvement and/or development of portfolio and performance management system support (eg Epicenter). This effort will aid in coordinating and providing technical assistance and support for eligible applicants. These resources will allow the IPCSC and other authorizers to better automate and streamline their mandated compliance requirements. The goal of this support will be to help IPCSC and district authorizers more effectively track reporting, compliance, and performance data shared with schools, and state and community partners (including Bluum). It would also help expand the state’s overall capacity to provide high-quality authorizing for more schools.

Upon receiving CSP funds, Bluum will work with the state of Idaho (IPCSC, state department and the governor’s office) to coordinate with NACSA, or some other national expert group, on a 2024-25 version of Idaho’s *Authorizer Evaluation Report*.

*Parent & Community Involvement: Practical Lessons from the Last 5-Years to Drive Next Steps*

**Making sure we cater to the learning needs of all students (a)(1)(xi):** Idaho charter schools often focus on specific themes – for example, CTE, classical education, STEM – specialized content that may be difficult for traditional school districts to offer but that is especially appealing to some parents and students. By offering content that appeals to specific interests or learning styles of students, these charter schools attract families across the socio-

economic spectrum. Whereas traditional public school districts build comprehensive schools to reach the broad majority of students, we have a menu of charter schools built to appeal to students whose needs may not be best served by the existing options.

This is not a case of siphoning off higher performing students or those from higher socio-economic backgrounds. Theme-based charter schools open according to expressed needs and desires of the community. Thus, STEM in Idaho Falls that has a charter school that caters to families interested in science and technology for their children; or a CTE-based school in the Caldwell area that was created in response to families focused on trade skills for their youngsters. Any charter school that opens must appeal to the learning interests of students in the area – our engagement and research with the community helps ensure that there is indeed a demand for what it offers. What’s more, the thematic focus in charter schools also makes it easier to attract teachers who are passionate about the specialization or who agree with the instructional philosophy and approach. And school leaders can select teachers whose profiles match the school’s needs.

**Reaching overlooked, underserved families (a)(1)(viii):** Survey research in Idaho indicates that families on the lower end of the socio-economic spectrum are more likely to lack information about charter schools. For example, they are far more likely to have the mistaken belief that charters are private schools that require tuition. The most attentive families – those who are typically also better-off financially – are often the first to hear that a new charter school is opening in their community, to know that it is tuition-free, and thus to consider this option for their children.

Aware that this “knowledge discrepancy” exists, it is our responsibility to proactively reach out to families and communities that are less likely to be exposed to news about a school

opening, or less likely to attend town meetings where a new school option is being introduced. We can reach out to these families through intermediaries – churches, places of employment, cultural organizations, and targeted social media – to make sure that they hear about all the educational options that are available to their children. Word-of-mouth remains one of the most effective marketing techniques, so identifying influential community members and partnering with them to get the word out about charter schools will be key. A case in point was discovered in our research: working with federally funded migrant outreach workers is essential for reaching migrant families to inform them about charter schools in their communities.

**Hispanic families: from acceptance to inclusion (a)(1)(iii):** Approximately 18% of Idaho’s current student population is Hispanic. Over the past few years, we have invested in a strong, multi-year research effort to understand the perspectives and desires of Idaho’s Hispanic families. Our leadership interviews and focus groups with Hispanic parents have shown that there are many opportunities for strengthening relationships between families and schools.

The onus is on the schools to enhance Spanish language support, to educate teachers and administration about what Hispanic parents need to see and hear to make them feel their school cares about their children, and to teach the schools the difference between truly engaging Hispanic parents and merely sending out informational announcements. With only a few exceptions, the agenda of Hispanic parents in terms of what they want their children to learn is remarkably aligned with what any parents want. Our schools need to engage Hispanic families so that they know and feel that all children are part of the same learning community.

**Redressing inequities facing rural families (a)(1)(xi):** Rural communities face inequity in Idaho because they have a much narrower economic and population base from which to draw students and funding. This means they typically can’t support an expanded menu of school

offerings for their students. But a charter school that opens in a rural community can invigorate public education and opportunity for families. It can be a new option driven by new investment, a new management structure, and new ideas for teaching that do not require taxing a community with limited economic means.

Our experience has shown that with rural communities it is especially important to launch a charter school in collaboration with the community and the public school district. For one thing, the charter school must appeal to the real learning needs and interests of the families – and we can only grasp their interests by holding real conversations and engagement with the parents and leaders in the community. Collaboration with the local public school district will also ensure that the charter school is expanding the menu of choices to families, not cannibalizing the student population by simply creating a different school that offers the same curriculum. Just as importantly, collaboration with the school district sends the signal to the community that the charter school is an enhancement to the existing public school system rather than an indictment of it.

**Flexibilities (a)(1)(xi):** Idaho’s public charter schools preserved flexibilities include those below:

**Table 10: Basic Charter Flexibilities in Idaho Code**

1) Idaho law allows a variety of charter school authorizers, including the PCSC, school districts, and public and nonsectarian colleges and universities <b>(33-5202A)</b> .
2) Charters are allowed to be their own LEAs and are fiscally and legally autonomous schools with independent charter school boards organized and managed under the Idaho nonprofit corporation act <b>(33-5204(1))</b> .
3) A charter school may sue or be sued, purchase, receive, hold and convey real and personal property for school purposes, and enter into contracts in its own name, including contract for services <b>(33-5204(3))</b> .
4) A charter school may borrow money to finance the purchase or lease of school building facilities, equipment and furnishings for those buildings <b>(33-5204(4))</b> .
5) A nonprofit charter school board may hold multiple charters <b>(33-5204(1))</b> .

6) Teachers in charter schools are considered public school teachers and employees of the charter school. The staff of public charter schools are considered a separate unit for the purposes of collective bargaining (33-5206(3). As of 2023, however, there are no unionized charter schools in Idaho.
7) Charter school teachers are part of the Public Employee Retirement System of Idaho.
8) Charter School can contract with EMOs and CMOs for management purposes (33-5206(10)a).
9) Virtual charter schools are allowed (33-5205(6).
10) Charter schools can certify their own administrators (33-5206(4).
11) Charter schools can certify their own teachers (33-5206(6).

**School Closure Protocols (a)(1)(iv):** Idaho statute provides clear guidance to assist students enrolled in a charter school that closes or loses its charter to attend other high-quality public schools. Per Idaho Code 33.5212. School Closure and Dissolution – “prior to any public charter school closure decision, and authorized chartering entity shall have developed a public charter school closure protocol to ensure timely notification to parents, orderly transition of students and student records to new schools...In the event of a public charter school closure for any reason, the authorized chartering entity shall oversee and work with the closing school to ensure a smooth and orderly closure and transition for students and parents, as guided by the closure protocol.”

The IPCSC Closure Protocols follow, and this is utilized by district authorizers:

- The implementation of closure protocol shall begin immediately following the issuance of:
  - Written notification of the IPCSC’s non-renewal decision; or
  - Written notification of the IPCSC’s decision to revoke; or
  - Written notification of the public charter school’s decision to relinquish its Charter.
- Within three (3) business days of the implementation of closure protocol, representatives of the public charter school’s board and administration shall meet with staff

representatives of the IPCSC and the SDE to review and begin the IPCSC's closure protocol.

- The closure protocol must begin regardless of whether or not a school has chosen to appeal the decision.
- The school shall cooperate with the IPCSC and the State Department of Education through the closure process, and shall perform the following actions according to IPCSC closure protocol:
  - Notify stakeholders (e.g., parents, local districts, etc.) of closure; and
  - Develop and monitor implementation of the closure plan; and
  - Provide educational services in accordance with the Charter and Performance Certificate until the end of the school year, or the agreed upon date when instruction will stop; and
  - Assist students in transferring to, or applying for, enrollment at schools that meet their educational needs; and
  - Address the school's financial, legal and reporting obligations.

#### D. QUALITY OF THE MANAGEMENT PLAN

The Idaho **Building on Success for Future Excellence** management plan is summarized in Table 11.

Table 11 Building on Success for Future Excellence Management Plan		
<b>Objective 1:</b> <i>Increase the number of quality charter school seats in Idaho by 5,900 students</i>		
<b>Responsible parties:</b> Bluum, and Subgrantee Charter Schools		
<b>Resources:</b> Federal CSP grant dollars, JKAF grant support, Bluum expertise, authorizer, outside expertise as needed		
<b>Partners:</b> JKAF, national experts & nonprofit partners, school operators, community & parent groups, authorizer, school districts & Idaho State Department of Education		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes
Bluum develops rigorous RFA to solicit outstanding applicants to compete for CSP subgrants	Applications reviewed, with preference points awarded for post-secondary options, supporting needier & rural students & district authorized/partner subgrant schools	



Bluum organizes statewide charter school training workshops for potential applicants and authorizers; Bluum experts & external experts offer TA to enable highest-quality proposals	Bluum coordinates sharing of best practices for: staffing plans, PD plans, acquisition of supplies, training & equipment, engaging stakeholders, facility financing & non-sustained costs for charter opening, replication, or expansion	Increased number of high-quality charter school seats available to Idaho students statewide
Bluum develops scoring rubric, selects & trains Peer Reviewers for rating CSP applications	Highest-quality applicants selected for CSP subgrants	
Bluum awards subgrants for planning & starting high-performing public charter schools	Subgrant recipients notified & participate in meetings with Bluum staff to understand programmatic, financial, & evaluative expectations for their new school efforts	
Bluum, nonprofit/philanthropic partners, & authorizer in coordination with subgrantees, engage students' families & community stakeholders in decision making relevant to CSP grant objectives	From start & throughout implementation, family & stakeholder contributions are sought & valued, informing project strategies	
Bluum, with support of external experts, conducts onsite monitoring of all subgrantees within first 12 months	Subgrantees adherence to approved activities ascertained; TA needs identified	
Bluum & authorizers ensure that subgrantees develop transportation plan & tap state funding streams	Charter schools transportation plans address the needs of all students, including homeless & students with disabilities	
Bluum coordinates training with in-house & outside experts & state agencies as necessary for charter access to federal funding & all state resources	Charter schools receive their equitable share of federal and state dollars, e.g. Title 1, Special Education, facilities, transportation reimbursement, etc.	
Bluum coordinates training with outside experts & state agencies to offer annual fall/spring federal programs training, prior to CSP subgrant application period	Charters attend annual fall/spring federal programs training, receiving ongoing PD & TA, and opportunities to collaborate with other LEAs across Idaho	
Charters contract with independent auditor, in order to participate in annually-required financial audits	PCSC & participating district authorizers work with charters in the resolution of any findings from audits	
PCSC & participating district authorizers monitor their schools in compliance with their school performance certificates	PCSC & participating district authorizers may revoke a charter at any time, after notification & time for corrective action	
Bluum coordinates RFP, scoring rubric, & peer review process	Subgrantees are selected & provided support with incubation, new start, expansion, and/or improvement	
Bluum coordinates experts and state agencies to provide support to charter school applicants and subgrant awardees focused on, but not limited to: -Incubation support -Supporting all students -Teacher recruitment & retention -Instructional supplies & technology -Professional development & licensing	Initial supports provided to applicants and subgrantees focus on school and network level needs assessments, special education, ELL, incubation, staffing & instructional supports, & stakeholder outreach and engagement	

-Parent, family, & community outreach		
Bluum surveys applicants and subgrantees on the quality of supports provided by outside experts and nonprofit partners	Applicants provide information to Bluum and their authorizers about quality of support services they receive from outside experts and nonprofit partners	
<b>Objective 2: Support quality authorizing in Idaho while disseminating and supporting best authorizer practices statewide</b>		
<b>Responsible parties:</b> Bluum, PCSC, district authorizers & outside experts/nonprofit partners		
<b>Resources:</b> Federal CSP grant dollars, Bluum, and state approved dollars		
<b>Partners:</b> National & inhouse experts & nonprofits (e.g., NN4DA), and school districts		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes
Bluum partners with NN4DA, National Charter Schools Institute or other national charter group to support the improvement of portfolio & performance management processes utilized by Idaho authorizers	Bluum organizes demonstrations & trainings for PCSC & other authorizers in use use of portfolio & performance management systems (eg Epicenter)	Quality charter school authorizing in Idaho is expanded to more public charter schools
Bluum coordinates with national experts on charter authorizing to map out improvement strategies for the PCSC & other state approved authorizers.	-Builds on 2019 NACSA Authorizer Evaluation Report that includes recommendations for: a) improving authorizing efforts of PCSC, b) improving authorizing policies statewide; and c) improving district/college authorizer practices. Follow-up report issued in 2025	
Bluum coordinates with NN4DA or others on charter school authorizing to develop training for districts & other eligible public and private entities interested in becoming high-quality charter school authorizers	-Develop curriculum of trainings & resources designed to assist all Idaho authorizers -Across 5-year grant period sustained TA & PD is made available to all Idaho charter school authorizers thru inhouse expertise & partners like NN4DA, National Charter Schools Institute &/or NACSA -Across grant period one annual training will be provided to promote collaboration among authorizers, share challenges/best practices in critical areas, e.g., financial oversight, SpEd & EL rights, enrollment/recruitment compliance, discipline policies	
<b>Objective 3: Evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system</b>		
<b>Responsible parties:</b> Bluum, State Department of Education, State Board, authorizers & outside experts/nonprofit partners		
<b>Resources:</b> Federal CSP grant dollars, Bluum, and JKAF		
<b>Partners:</b> Parents, community leaders, national expert researchers/nonprofit partners, old & new media		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes

Partner with 3 <sup>rd</sup> -party experts to identify & report all data collection elements relevant to CSP grant	Elements include both federal GRPA required elements, as well as project-driven elements identified by Idaho	All lessons learned through the <b>Building on Success for Future Excellence</b> Project are shared widely across the state of Idaho and nationally
In collaboration with State Board, Bluum collects student performance data on statewide assessments for all subgrantee charters	An annual summary of the academic, fiscal, and compliance performance of all subgrantee charter schools is created, which provides key data points for <b>Building on Success for Future Excellence</b> annual report	
Outside expert nonprofit is engaged to generate annual report – utilizing state achievement data, authorizer reports, etc. – on the efforts, lessons learned, and impact of <b>Building on Success for Future Excellence</b>	<b>Building on Success for Future Excellence</b> annual report is generated and its key findings and lessons are disseminated widely across the state of Idaho and nationally	
Bluum coordinates expert research team and key stakeholder focus groups for both qualitative and quantitative research	Reports in 2024, 2026, and 2028 summarizing parent and community engagement and lessons learned.	
All evaluation results, annual reports, and community & parent engagement surveys are broadly disseminated	Lessons learned from <b>Building on Success for Future Excellence</b> project is shared via Bluum, state, and national partner networks & organizations	

*Time commitment of key personnel:* Bluum is the nonprofit statewide school support entity in Idaho that led Idaho’s *Communities of Excellence* CSP program (2018-23), and that will lead this proposed CSP project. Bluum assumes full legal responsibility for ensuring all funds received through the award are used for the purposes and intent outlined in the conditions of the grant agreement. Annual performance and compliance reviews will be performed to ensure compliance with both federal and non-federal guidelines and Bluum policies.

Any compliance or performance findings will result in: 1) disallowance of expenditures; 2) development of a corrective action plan, shared with USEd, Idaho State Board of Education, Idaho State Department of Education and public authorizers that addresses/corrects findings, and 3) if not corrected, possible cancellation of grant and return of misused or unspent funds.

Bluum will retain direct management of 100% of funds, including the 90% reserved for direct subgrants to eligible applicants. Bluum will utilize the 3% administrative set aside to support the administration of the subgrant application process and coordinating other partners to

provide technical assistance to both authorizers and support organizations. The remaining 7% of funds will support technical assistance to both eligible applicants receiving subgrants under the state entity's program and quality authorizing efforts in Idaho (see project budget and narrative).

**As a group, the Bluum team has extensive prior experience conducting programmatic and fiscal monitoring in connection with both federal grant programs and philanthropic grant programs.** Bluum's Director of Federal Grants and Support Amy Hukkinen will oversee the day-to-day management process of monitoring schools. Hukkinen served in this role for the 2018-23 Bluum CSP grant. Bluum has become a national expert in this work. Hukkinen, with the support of the Bluum leadership team, designed and implemented the technology and grant administration processes that supported the interface of Bluum's staff and CSP subgrantee schools. Hukkinen will be funded as a 1.0 FTE under the proposed Bluum CSP grant as she was under the previous grant. Bluum will also fund a .25 FTE Charter Grant Auditor with CSP administrative funds.

**All other Bluum expert staff support is in-kind to this CSP grant project and is covered by JKAF funding.** Bluum's governing board is made up of experts and practitioners in charter school operations and facilities, education law, business, and philanthropy. Bluum Board Chair, Toby Prehn, over a 30-year career has co-founded over a dozen companies in a wide variety of industries, including commercial real estate, energy production and specialty finance. (see appendix for bios for Bluum board members).

The board oversees and provides guidance to Bluum management; Terry Ryan, CEO of Bluum, will serve as the project director with the main responsibility for ensuring the execution of Idaho's state plan. His time, along with that of Bluum's CFO Marc Carignan, will be provided in-kind to this project. Ryan will dedicate up to 20% of his time to overseeing the effective

administration and implementation of this project. Carignan will provide financial oversight and will commit up to 20% of his time. Table 12 describes our project lead team.

**Table 12: Project Lead Team**

Name	Role	Experience Highlights	Funded by:
Terry Ryan	Project Director	<ul style="list-style-type: none"> <li>-Bluum CEO and cofounder since 2013</li> <li>- Idaho's <i>Communities of Excellence</i> CSP Project Director 2018-2023</li> <li>-Thomas B. Fordham Foundation/Institute's VP for Ohio Policy and Programs 2001-2013</li> <li>-Hoover Institute Fellow, Aspen Institute Fellow, NAPCS SLC member, PIE Finance</li> <li>-Program Director for the 21<sup>st</sup> Century Learning Initiative (UK &amp; DC) and fellow for Foundation for Education for Democracy (Warsaw, Poland)</li> <li>-MA in International Studies from the University of Denver</li> </ul>	JKAF
Amy Hukkinen	Director of Federal Grants	<ul style="list-style-type: none"> <li>-Directly manages Bluum's \$22 million CSP Grant</li> <li>-Designs and implements systems, technology, &amp; grant administration processes and TA efforts</li> <li>-Teach for America Corp Member on Hawaii's Big Island</li> <li>-Rural school teaching experience</li> <li>-Member of Cohort 8 of the PiE Leadership Institute</li> <li>- BS in Business Administration Management and a Master of Science in Professional Security Studies from New Jersey City University</li> <li>-NSA Certified Information Systems Security Officer (ISSO)</li> </ul>	Federal CSP Grant
Marc Carignan	CFO	<ul style="list-style-type: none"> <li>-Bluum CFO and cofounder since 2014. Manages CSP grant finances &amp; oversees &amp; approves all CSP allocations. Provides schools TA &amp; support on all matters related to CSP, federal &amp; Idaho school finance</li> <li>-CPA at Grant Thornton LLP, where he spent seven years auditing non-profit and for-profit entities</li> <li>-14-years as a hands-on finance, information systems and operations manager for several manufacturing companies.</li> <li>-BA in business management from California State University, Fullerton.</li> </ul>	JKAF
Max Koltuv	Chief Academic Program Officer	<ul style="list-style-type: none"> <li>-Supports Bluum partner schools in ensuring that all students learn at accelerated rates</li> <li>-20-years as an educator and executive coach for leaders of charter management organizations and other education reform organizations</li> </ul>	JKAF

		<ul style="list-style-type: none"> <li>-Head of Elementary Schools at Achievement First; oversaw a network of 16 elementary schools throughout the northeastern U.S.</li> <li>-Started his career at The Monitor Company, an international strategy consulting firm, before transitioning to a teaching role at a high-performing, urban charter school in Massachusetts</li> <li>-Graduate of the Building Excellent Schools Fellowship and of the KIPP School Leadership Program</li> <li>-Graduate of Yale College</li> </ul>	
Jennifer Ribordy	Special Education Director	<ul style="list-style-type: none"> <li>-Over 20-years of experience in special education</li> <li>-Special Education Programming Consultant for West Ada School District. Idaho's largest with 40,000 students</li> <li>-Spent eight years working in Texas at both rural and urban districts</li> <li>-B.A. from the University of Idaho in Special Education, Secondary Education and Psychology. Completed her M.Ed. in Special Education/Educational Diagnostician at Sam Houston State University in Huntsville, TX.</li> </ul>	JKAF
Keith Donahue	Director of School Strategy and Operations	<ul style="list-style-type: none"> <li>-11-years experience running Sage International Charter School, Boise</li> <li>-Prior to his career in the education sector, Keith spent 12 years in the legal profession</li> <li>- BA in Economics from the University of Colorado Boulder in 1992 and his JD from Lewis and Clark School of Law in Portland, Oregon in 1998.</li> </ul>	JKAF

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#### **\*Assurances**

Idaho's signed assurance can be found in appendix A.

#### **\*Federal Waivers**

Idaho Requests no federal waivers for this project.

#### **\*State Waivers**

This provision is not applicable to Idaho.