



FORTUNE
S C H O O L
INSPIRING LEADERS.

FULFILING THE PROMISE

Project Narrative for Replication and Expansion
of High Quality Charter Schools Competition

CFDA Number: 84.282M

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Absolute Priority 1 – Low-Income Demographic

Fortune School of Education (FSE) is committed to providing students the skills and training necessary to become contributing members of their school, family and community. Students will participate in a college preparatory program with a focus on literacy, math and service in the community. Fortune School of Education operates six schools in California, five located in the Greater Sacramento Area (Fortune School)¹ and one school in San Bernardino (Hardy Brown College Prep), making their total enrollment 1,665 students. In aggregate **1,399 (84%) of FSE’s students enrolled live under the national poverty level and qualify for Free and Reduced Priced Meals (FRPM) under the federal School Nutrition Program (SNP)²** (California Department of Education, 2016). FSE continues to mold and prepare high achieving scholars of good character for college and leadership in a democratic society despite demographics. In addition, the high-quality work Fortune School of Education is doing is very much supported by other organizations focused on providing quality education for the disadvantaged [See support letters – Appendix C].

Recipients of Title I, Part A

All six schools that FSE operates are **recipients of the Federal categorical program Title I, Part A funds also known as Education for the Disadvantaged – Grants to Local Educational Agencies, Improving the Academic Achievement of the**

¹ Fortune School has one County District Code (CDS) for all five locations in the Sacramento area including: Fortune School (K-6), William Lee College Prep (K-5), Ephraim Williams College Prep (6-8), Alan Rowe College Prep (TK-6) and Hazel Mahone College Prep (TK-3).

²The School Nutrition Program (SNP) is a federally assisted meal program operating in public and nonprofit private schools and residential child care institutions throughout the United States. Through this program, nutritionally balanced low-cost or free meals are served to more than 30 million children daily. <http://www.cde.ca.gov/fg/aa/nt/index.asp?tabsection=1>

Disadvantaged. The primary goal of the Title I program is to ensure that all students have a fair and equal opportunity to obtain a high quality education and reach at a minimum, proficiency on state content standards and assessments (U.S. Department of Education, 2015). Based on eligibility for free and reduced lunch all six schools are considered Title I Schoolwide, making all of FSE's enrolled scholars beneficiaries of Title I, Part A funding. Fortune School of Education uses its Title I funding to supplement their current curriculum with programs such as: music integrated with math, art, response to intervention for English Language Arts and parent education opportunities.

In the Sacramento Area FSE currently serves, 81% of students who come from economically disadvantaged communities and households. In comparison to Sacramento County which serves only 61% economically disadvantaged students. **In San Bernardino, California FSE serves 95% students who come from economically disadvantaged households,** in comparison to the 70% of economically disadvantaged students being served within the San Bernardino City Unified School District boundaries.

The CSP Replication and Expansion Grant will support FSE's and their mission to continue serving its current students as they advance a grade level and their schools expand with them, replicate its model of rigor and college prep by open a new middle school and early college high school in the Greater Sacramento area [See Appendix I]. In addition, this grant will allow FSE to effectively and responsibly serve its waitlist of 501 students by focusing on providing a conducive learning environment and allowing a high quality charter school management organization (CMO) to expand its positive impact in education and the community. Examples of such impact will be seen in

the 2017-18 school year as Fortune School of Education anticipates the opening of the first and only Early College High School in the Greater Sacramento Area. The Early College High School model fully integrates high school, college and the world of work allowing scholars to earn a high school diploma and an associate's degree, allowing our scholars to transfer into a California State University as a junior. This opportunity will be a major **economic advantage for the scholars they serve as it will reduce tuition costs from four years to two years.** Automatic enrollment into the early college high school will be given first to FSE's current students.

Fortune School of Education is committed to continue expanding and replicating an education model that provides learning environments where students, faculty and parents embrace a standard of excellence in academic achievement, ethics and citizenship despite demographics.

Competitive Preference Priorities

Competitive Preference Priority 1 - Promoting Diversity

Parents and guardians are able to enroll their students through an open enrollment process or participate in a lottery process once spaces are filled during open enrollment. Although, FSE's primary focus is to close the African American Achievement Gap no preference is given to students of any ethnicity or economic profile, and no ethnicity of students is excluded or limited. **Of students enrolled in our five schools located in Sacramento, California: 61% African American, 25.2% Hispanic, 8.5% two or more races and 5.3% other. Of the students enrolled at FSE's San Bernardino, California school: 66.5% African American, 23.2% Hispanic, Two or more races 7.4% and 2.9% other.**

As Fortune School of Education plans to expand and replicate its high quality charter school model focusing on its mission and vision, diversity is as at the forefront. Currently all six schools operated are located in extremely diverse communities and the two new schools planning to be opened will also be strategically placed within a diverse community. In a world and workplace that is diverse, FSE is aware of the benefits to having diversity amongst its students and teaching staff.

Diversity in Recruitment strategies for Students and Teachers

FSE has planned to increase its enrollment by 20% in the 2017-18 school year focusing on recruiting for the Early College High Scholl scheduled to open in the 2017-18 school year. The below chart identifies the top four communities in which the students enrolled live. Also shown in the below tables are the racial demographics of those areas (Bureau, United States Census, 2015)³.

Sacramento Schools (5)

Zip Code Demographics					
% Of Students Enrolled	Zip Codes	White	Black	Asian	Other (Including Hispanic)
22%	95823	27%	23%	22%	28%
11%	95828	32%	15%	31%	22%
8%	95820	46%	12%	11%	31%
6%	95758	45%	13%	24%	18%

San Bernardino School (1)

Zip Code Demographics					
% Of Students Enrolled	Zip Codes	White	Black	Asian	Other (Including Hispanic)
19%	92410	43%	13%	3%	41%
16%	92405	46%	13%	1%	40%
8%	92324	44%	9%	5%	42%
8%	92411	39%	18%	2%	41%

³ Statistical information referenced also came from <http://www.unitedstateszipcodes.org>.

In the geographical area of the strategic recruiting plan, FSE’s recruiters target community organizations and events that have historically produced diverse demographics of parents and students. Example of such organizations are: Head Start programs, Churches, Sporting events and Avid groups.

Diverse Teaching Staff

FSE continues to strive at making sure that their teaching staff diversity reflects the diversity of its students. To ensure such diversity FSE really focuses on recruiting teachers who are “sold out” and committed to the mission and vision of the organization, recruit from colleges and universities that have a history of yielding diverse educators and partnering with community organizations such as UCAN (helps students of color prepare for and enroll in college). FSE currently has a teaching staff of about 78 who are 31% Black, 38% White, 18% Hispanic and 13% Other.

Diverse Learners: Students with Disabilities

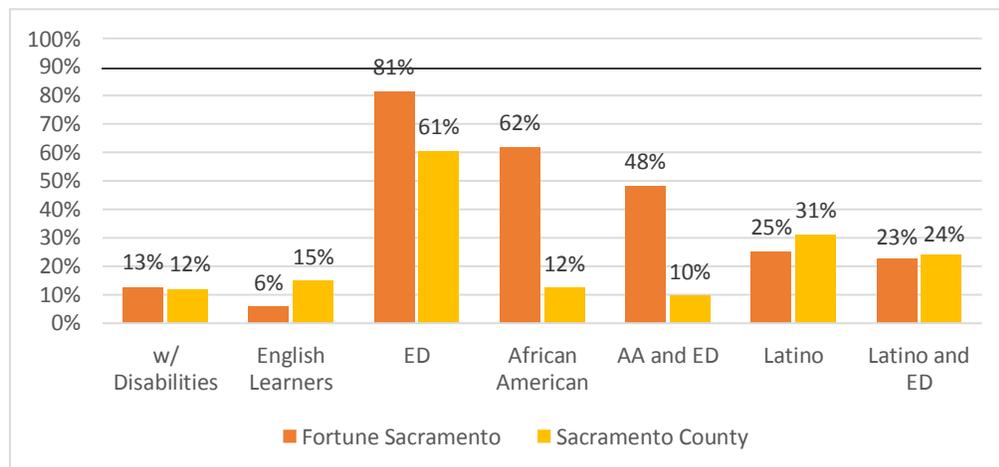
Across all six schools FSE has identified that about 12 percent of students enrolled in one of five schools in the Greater Sacramento Area compared to 13% in Sacramento County and about 11 percent of students enrolled in the San Bernardino, compared to 12% in the San Bernardino City Unified School District, have disabilities. In comparison to the traditional public school districts and the percentage of students with disabilities, FSE’s lower rate reflects their commitment to early intervention and reducing the prevalent over-identification of low-income youth of color.

English Learners

The rates of English Learners enrolled in both Sacramento and San Bernardino is eight and four percent. Although FSE has a lower percentage rate of English Learners

compared to the demographics of their authorizers FSE actively recruits students of all ethnic and language backgrounds. FSE schools have had a tremendous success in serving English Learning students and as result enrollment has increased for this demographic of students as parents learn more about the program. The location of the two new campuses are located in communities that will give FSE more access to an increased population in English Learners. FSE’s instructional model is highly successful. Such program design encourages students from all ethnic, linguistic and economic backgrounds to attain the benefits of having a diverse student body. **As such, FSE operates high quality schools in both Sacramento County and San Bernardino.** The charts below illustrate FSE’s diversity in their students compared to their authorizer’s districts⁴.

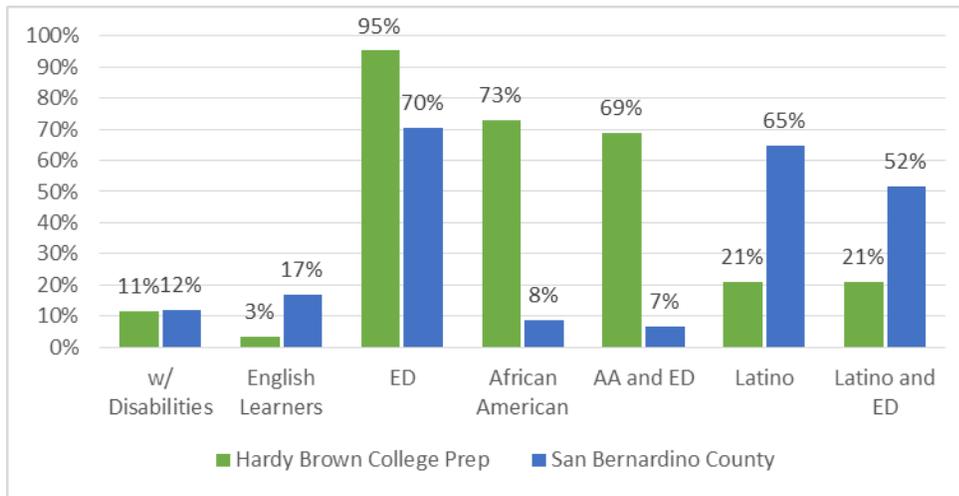
Sacramento



ED - Economically Disadvantaged

⁴ Fortune School of Education has two authorizers: Sacramento County Office of Education and San Bernardino City Unified School District. Based on the data and analysis conducted by Sacramento County Office of Education there was currently no public school district in Sacramento County that addressed the low performance for African American and Latino students.

San Bernardino

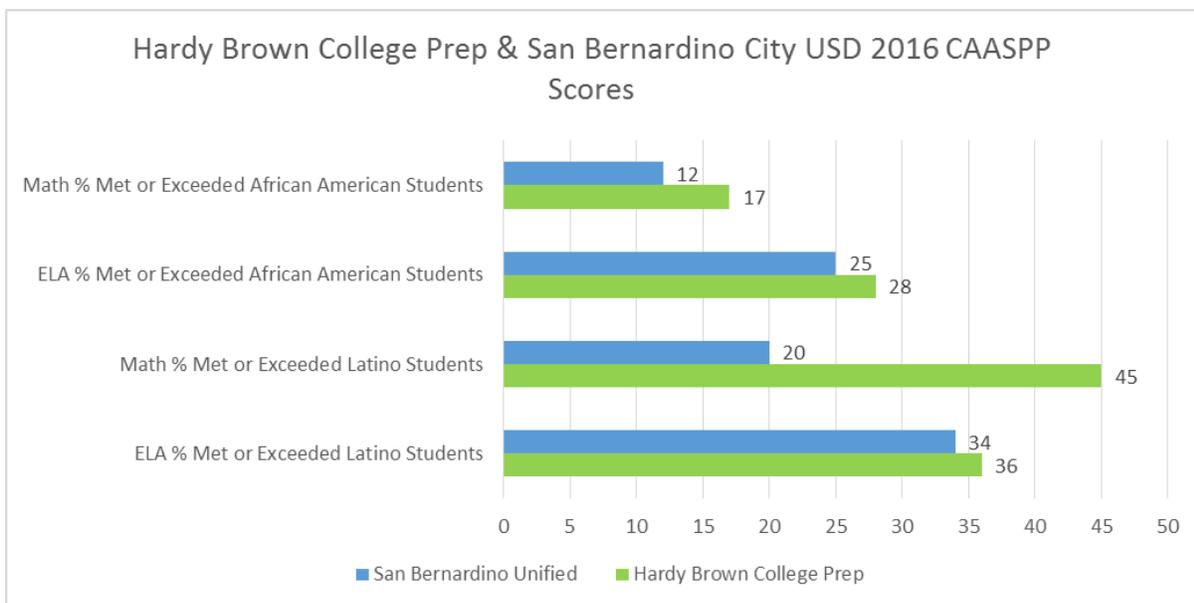
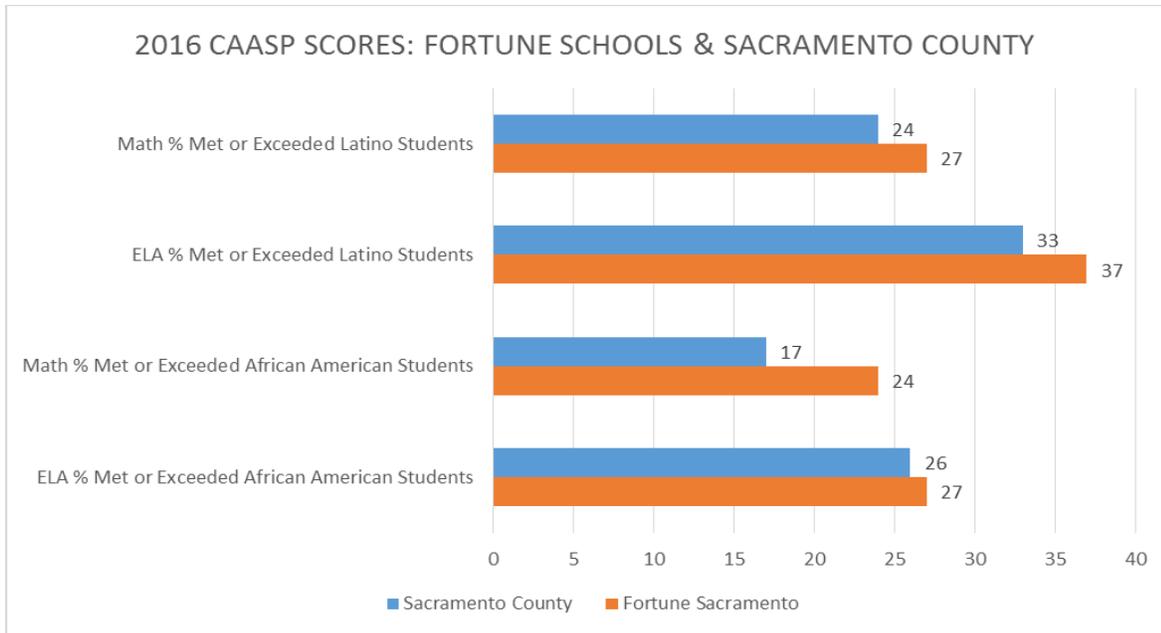


1 ED - Economically Disadvantaged.

Competitive Preference Priority 2 – School Improvement through Turnaround Efforts

All six schools including the new middle school and early college high school they are opening, Fortune School of Education's (FSE) schools have been strategically constructed from the ground up in communities where the lowest performing subgroup and their achievement gap was pervasive. While FSE has not taken over a failing school, the opening of their schools gave the community and their failing children the opportunity to receive high-quality education that understood the needs and addressed the low performance. CMO funds were used to build a school to address the academically poor performing schools rather than restarting a failing public school as a charter school. The charts below illustrate the academic performance of FSE's students in comparison to their peers⁵.

⁵ Fortune School of Education has two authorizers: Sacramento County Office of Education and San Bernardino City Unified School District. Based on the data and analysis conducted by Sacramento County Office of Education there was currently no public school district in Sacramento County that addressed the low performance for African American and Latino students.



Competitive Preference Priority 3 – Novice Applicant

Fortune School of Education has never received a CSP Replication and Expansion Grant, has never been a member of a group that has received a replication and expansion grant and has not had an active discretionary grant from the federal grant in the five years before the deadline date for applications for new awards under this replication and expansion grant competition.

Invitational Priority – Rigorous Evaluation

Fortune School of Education has established a strong track record, rooted in continuous improvement. Data driven practices are a significant part of their management model. FSE has participated in numerous national and regional advisory groups including projects with the California Charter School Association, Charter School Growth Fund, Charter Network Accelerator and has agreed to engage in partnerships for the 2016-17 school year with the Harvard Strategic Data Partnership and the Broad Residency. **FSE has conducted and will continue rigorous evaluations of its schools and their practices. FSE has a culture of reflection on all aspects of its programs, including data regarding student performance, attendance, finances and student behavior. These practices will meet *What Works Clearinghouse Evidence Standards*.** Please see Selection Criteria, subsection C: Independent Evaluation for more on Fortune School's current and future evaluation methods.

Selection Criteria – Quality of the eligible applicant

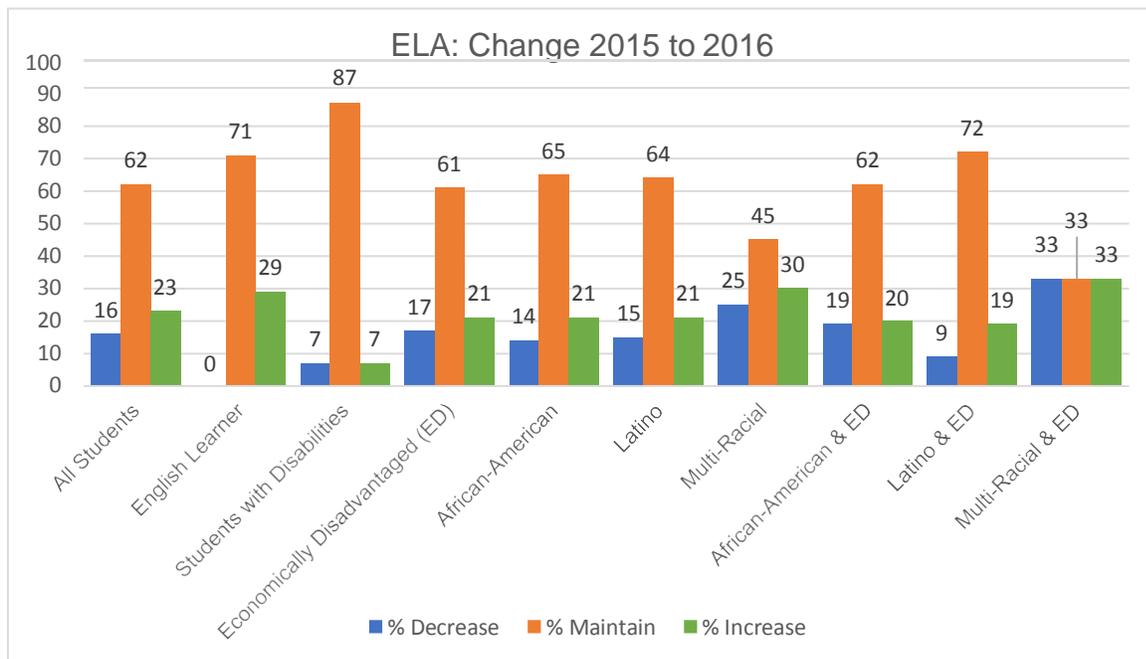
Selection Criteria A1 - Increasing Achievement: Two Years of Data

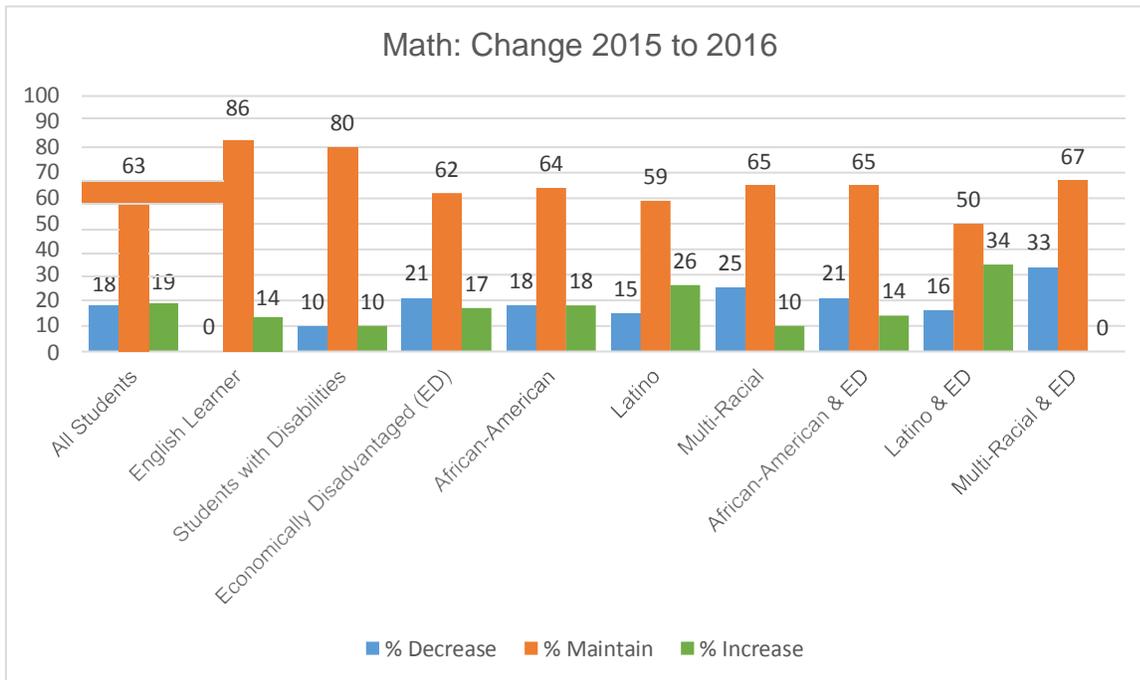
California has two years of Smarter Balanced Assessment⁶ results: 2014-15 and 2015-

16. Fortune School of Education (FSE) is able evaluate whether their own students decreased, maintained, or increased their achievement levels from one year to the next. In **English Language Arts (ELA) students were 7% more likely to increase their achievement level** than to decrease (23% increased vs. 16% decreased). In **Math,**

⁶ The Smarter Balanced Assessment System utilizes computer-adaptive tests and performance tasks that allow students to show what they know and are able to do. This system is based on the Common Core³ State Standards (CCSS) for English language arts/literacy (ELA) and mathematics. The Smarter Balanced Assessment System has three components designed to support teaching and learning throughout the year: the Summative Assessments, the Interim Assessments, and the Digital Library. <http://www.cde.ca.gov/ta/tg/sa/>

students were **1% more likely to increase** their achievement level than to decrease (19% increased vs. 18% decreased). The available data suggests that FSE’s students **outperformed the state in ELA – where 6% more students met standards – and matched the state in Math – where 1% more students met standards.** The overall pattern of outperforming the state extends to FSE’s many subgroups. The graphs below show the percent of students who decreased, maintained, or increased their achievement level. In ELA, every subgroup had a higher or equal percentage of students increase as decrease. In Math, our Multi-Racial subgroup had the largest percent decrease, but our English Learner and Latino subgroups were much more likely to increase than decrease. **Latino students who are economically disadvantaged were 18% more likely to increase their achievement level** than to decrease (34% increased vs. 16% decreased).





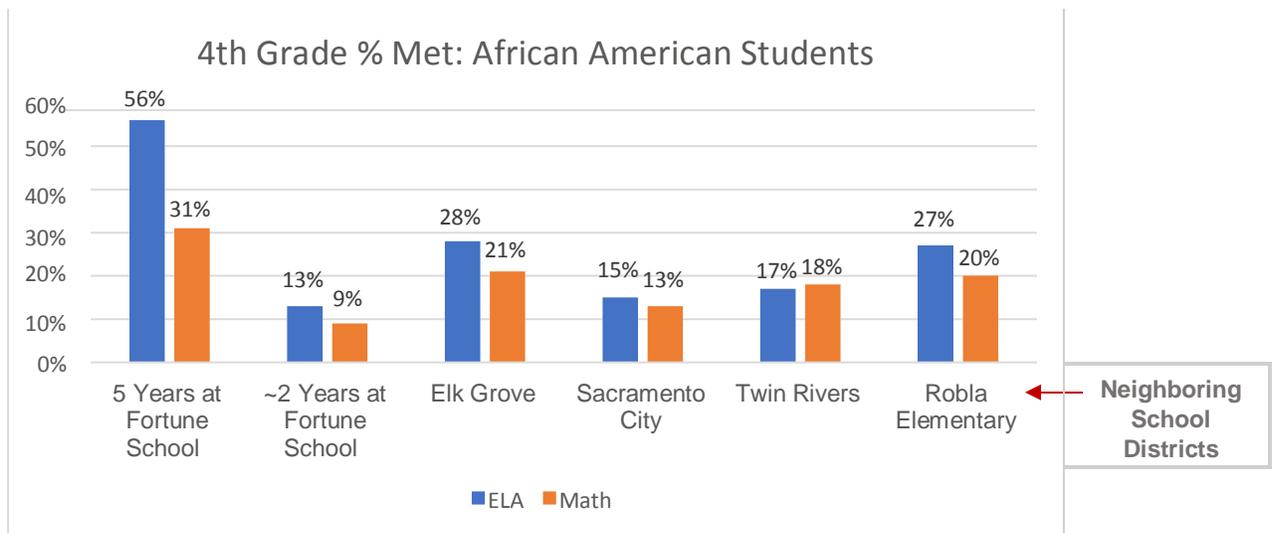
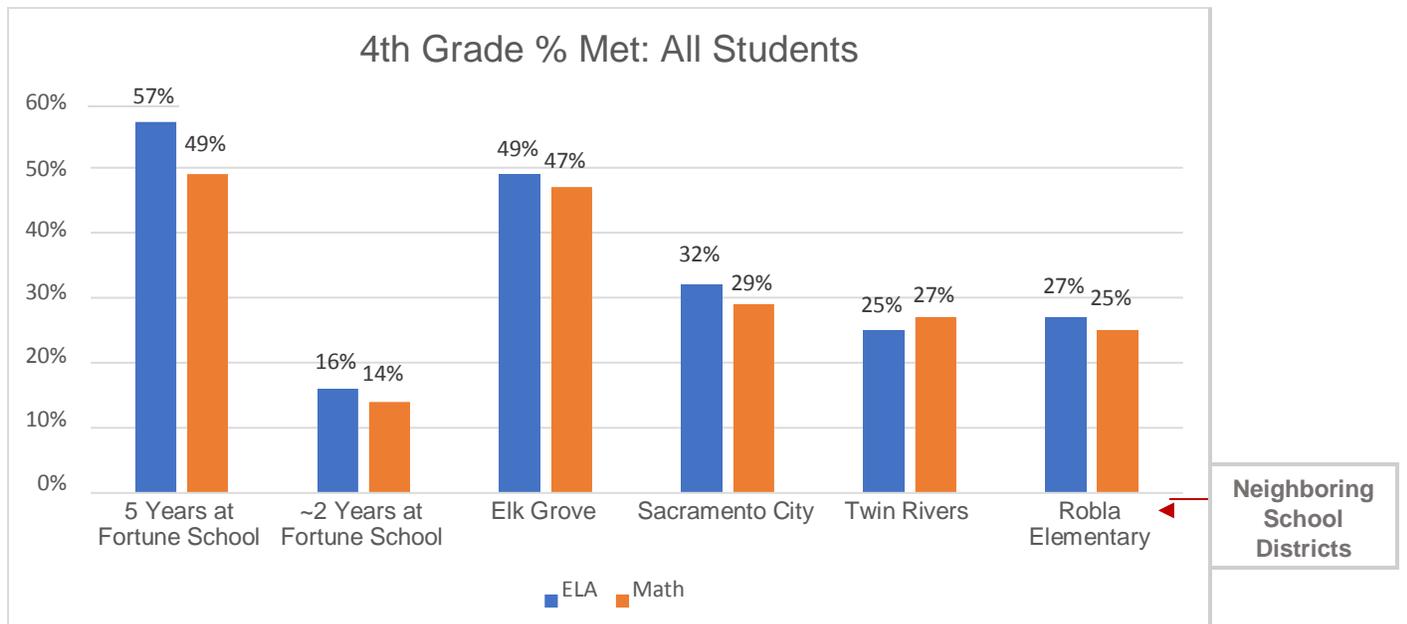
Increasing Achievement: Five Years of Impact

It is difficult for educators in California to estimate academic growth over the past five years as California did not administer summative ELA or Math assessments in 2013-14, therefore there is no comparable data from that year. State leaders claim it is not valid to compare current Smarter Balanced Assessments to the statewide assessments administered prior to 2013-14. The new assessments cover new standards, in a new format (computer adaptive), as part of a new accountability system. Even if FSE tried to use the prior assessments to estimate growth, FSE would only be able to do this for the small proportion of students who were in a tested grade and attending one of our schools in 2012-13. More importantly, FSE would have no comparison group to help determine the quality of that estimated growth. Such limitations have led FSE to take a different approach. FSE uses current achievement and the number of years the students have been enrolled in an FSE school to estimate the added benefit of each additional year with

them. The comparison groups are students who have been enrolled in an FSE school for a different numbers of years. FSE’s assumption is that students on average started at a similar academic starting point. While they cannot verify this assumption, it seems reasonable and is the best available option. To the extent that this assumption is valid, FSE is comparing how much students grew with them, to how much students grew at other nearby schools before they joined had enrolled with FSE. The following sections provide a concrete example of how this analysis works and an explanation of how we estimated our average impact on students over the past five years.

Two Types of Fourth Graders

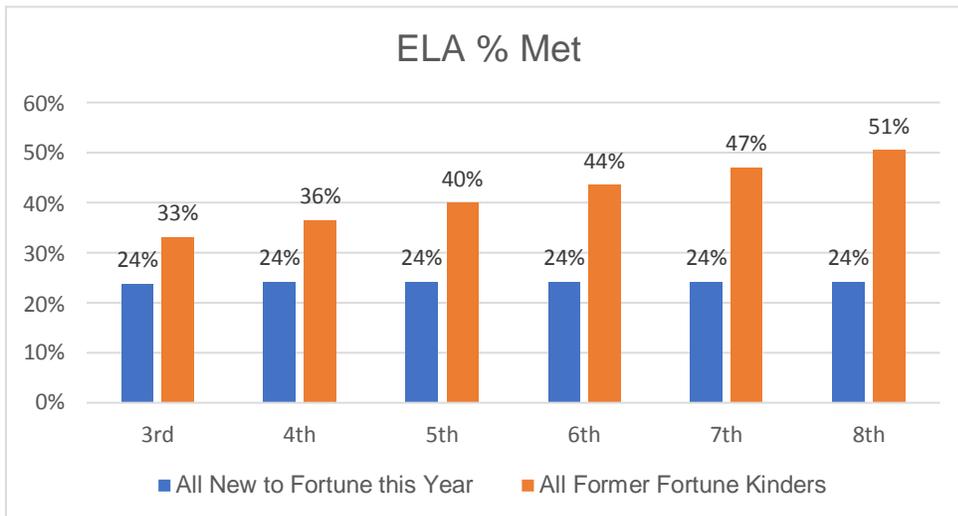
FSE began serving students in Sacramento when their flagship school “Fortune School” opened their doors fall 2011. In 2015-16, approximately half of the fourth graders at Fortune School had been Kindergarteners with us (i.e. “five-year” students). The other half of students enrolled later in their academic careers and had been with FSE for an average of two years (i.e. “two-year” students). The graph below shows that **FSE, five-year students are: over three times as likely to meet state standards as two-year students, and more likely to meet state standards than any nearby district.** The results are even more dramatic when focused on FSE’s African-American student subgroup. While this descriptive analysis cannot prove causality, it strongly suggests that **additional years enrolled in an FSE school helped students reach higher levels of achievement. FSE calls this the *Fortune Effect*.**



“The Fortune Effect”

The fourth graders at FSE illustrate a general trend across the system: more years with FSE is related to higher achievement. Multivariate ordered logit regression analyses allow us to estimate how one additional year in the FSE system impacts achievement [see appendix I for a full description of the analysis]. In an effort to isolate the impact of

time, the regressions include student-level covariates that are associated with achievement such as grade level and special education status. FSE uses CLARIFY, a program popularized by Harvard Professor Gary King, to run thousands of regression simulations and estimate the likelihood that students with particular traits would meet state standards. When FSE looks at two students who appear identical except for the number of years in the Fortune system, the student who has been with FSE for 3 years is **3-4% more likely to meet standards** than the student who has been with them for 2 years. The graph below shows the predicted scores for students at the two extremes: those who were new to FSE this year, and those who have been with them since Kindergarten. FSE predicts an enormous gap by 8th grade: 24% vs. 51%! As their system matures, higher proportions of our students will be with them since Kindergarten; this bodes well for FSE’s future achievement levels.



The graph above also shows that FSE’s five-year students outperform its local school districts. This is especially impressive in light of the fact that FSE serves a much more disadvantaged demographic than any of its neighboring districts. As FSE’s school system

matures, having more years with their students will help increase their overall achievement levels.

Selection Criteria A2: Achievement by Subgroup

Currently, achievement is the only relevant subgroup data available at the state level. In a few years, California should have chronic absence data and an academic growth measure at the subgroup level. The only attendance-related measure that the state currently reports is truancy, and school is the lowest level of granularity. High school and college indicators are not applicable because **FSE currently serve only grades K through 8. Therefore, FSE focus is on two complementary measures of achievement:**

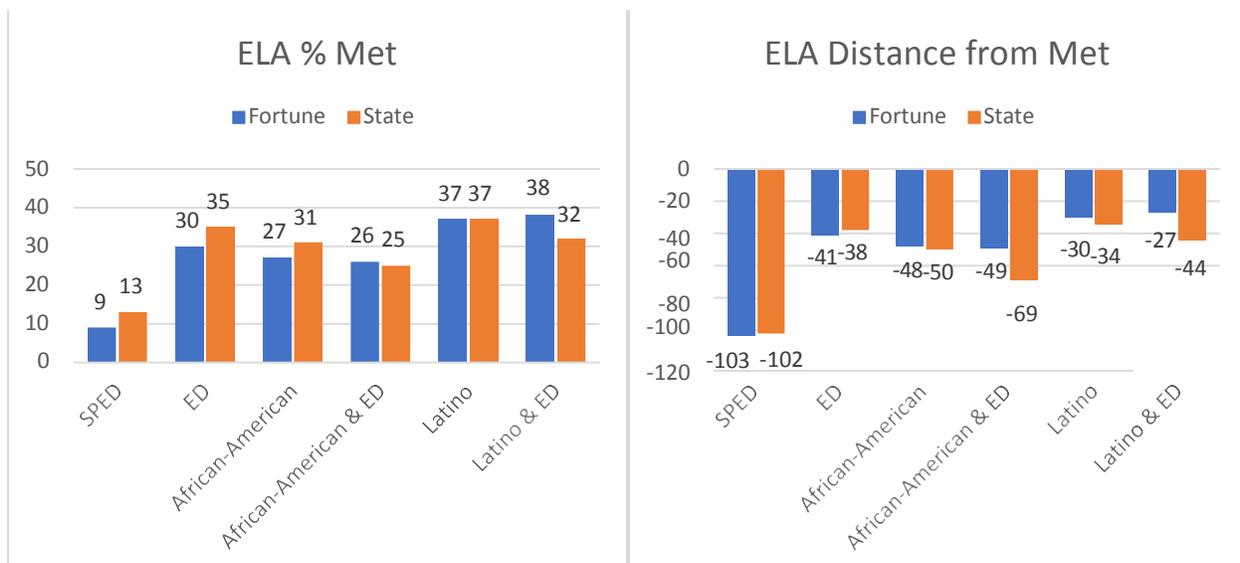
1. **% Met**, which is the number of students who earned a Level 3 (i.e. Met Standards) or 4 (i.e. Exceeded Standards) divided by the total number of valid scores. This is essentially a new name for % Proficient or Above, which was the primary measure of No Child Left Behind (NCLB) era.
2. **Distance from Met**, which is how far above or below – in terms of scale score points – the average student is from the Level 3 (Met Standards) cut point. In January 2017, the California State Board of Education adopted this as the measure of academic achievement for our statewide accountability system.

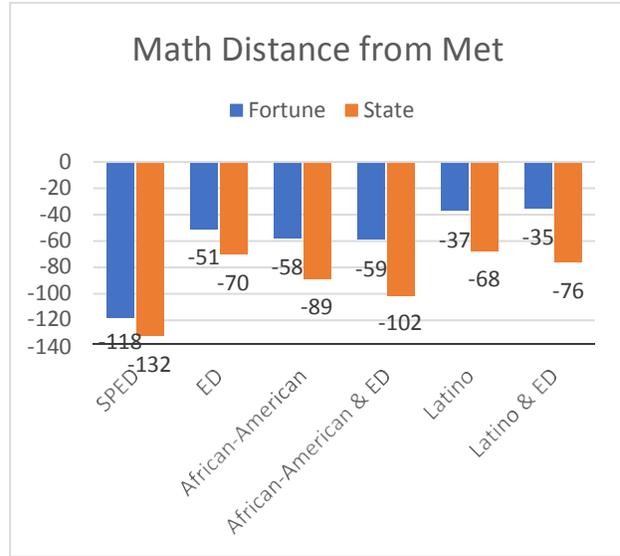
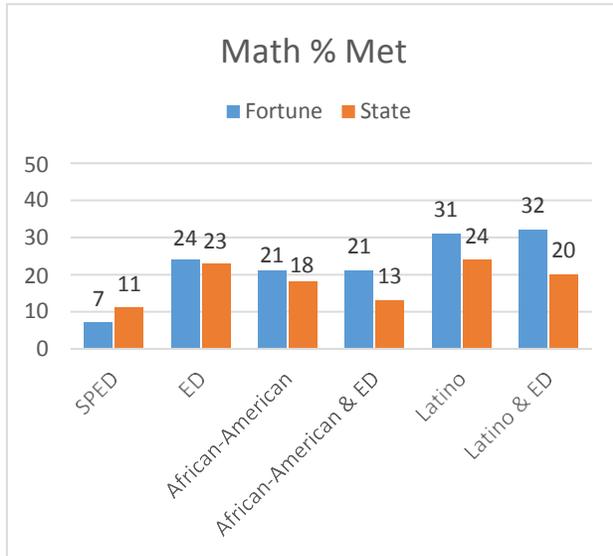
While Percent Met is better known, it also faces much more criticism. It “offers only limited and unrepresentative depictions of large-scale test score trends, gaps, and gap trends⁷.”

⁷ Harvard Professor Andrew Dean Ho, 2008. “The Problem with ‘Proficiency’: Limitations of Statistics and Policy Under No Child Left Behind” *Educational Researcher*, Vol. 37, No. 6, pp. 351–360. Available here: <http://journals.sagepub.com/doi/pdf/10.3102/0013189X08323842>.

In contrast, Distance from Met provides information that draws upon the entire distribution of student performance. It reveals not just whether the average student is above or below the Met cut point, but also how far away the average student is from that cut point. The graphs below show Percent Met and Distance from Met for the six significant (i.e. at least 30 students) and academically disadvantaged subgroups FSE tested in 2015-16.

Distance from Met shows that **most of our subgroups significantly outperform the state, and all of them at least nearly tie the state.** Even when FSE looks at the limited measure of % Met, two of their subgroups outperform the state in both ELA and Math: **African American & Economically Disadvantaged, and Latino & Economically Disadvantaged.** These two subgroups compose 81% of our test-takers, and **Distance from Met reveals that these are where we outperform the state by the largest margins.**





Students with disabilities (SPED)

When we look at % Met for ELA and Math, it appears that FSE’s students with disabilities score lower than the statewide subgroup. However, Distance from Met reveals that on average, FSE’s students with disabilities virtually tie the state in English Language Arts (ELA) (-103 vs. -102) and significantly outperform the state in Math (-118 vs. -132)⁸. This means that although not quite as many of FSE’s students with disabilities are Met or Exceeded, they tend to be closer to the Met cut point than the statewide subgroup. This means that the achievement of their students with disabilities tends to be higher.

Economically disadvantaged (ED)

In ELA, this subgroup is lower on % Met but nearly identical on Distance from Met (-41 vs. -38). In Math, this subgroup is nearly the same on % Met but performs significantly

⁸ Distance from Met is a new measure, so additional context helps us interpret the size of gaps. Looking across all grades, the distance from the Met cut point:

- down to the Nearly Met cut point averages 71 points for ELA and 76 points for Math
- up to the Exceeded cut point averages 83 points for ELA and 66 points for Math
- down to the lowest possible scale score averages 306 points for both ELA and Math
- up to the highest possible scale score averages 197 for ELA and 198 for Math

higher on Distance from Met (-51 vs. -70). While we and the state have similar proportions of economically disadvantaged students Meeting standards, our subgroup on average is much closer to the Met cut point.

African-American: Whole Subgroup and Economically Disadvantaged only

Whether we look at % Met or Distance from Met, FSE's scores for these two subgroups are very similar. **This reflects the fact that 91% of our African-American students are economically disadvantaged (compared to only 73% of African-American test-takers statewide).** The statewide African-American subgroup therefore includes a much higher percentage of students who are not economically disadvantaged. This explains why FSE always outperform the state more significantly when the focus is on African-American students who are economically disadvantaged. In ELA, the state has a higher % Met than FSE does for the African-American subgroup, but Distance from Met reveals that our subgroups have nearly identical performance (-48 vs. -50).

Latino: Whole Subgroup and Economically Disadvantaged only

FSE's scores for these two subgroups are also very similar. The reason is the same: 93% of FSE's Latino students are economically disadvantaged (compared to 80% of Latino test-takers statewide). Despite this, FSE's Latino subgroups outperform the state in both subjects. Even when measured by % Met, FSE's Latino students equal the state in ELA and outperform in Math.

Selection Criteria A3 - Noncompliance

Since the opening of its first school in San Bernardino, California and its subsequent five schools in Sacramento, California, Fortune School of Education has not been subject to the closing of its schools; revocation of its charter due to noncompliance with statutory or

regulatory requirements; has not had their affiliation with the applicant revoked or terminated; including though voluntary disaffiliation, has not had any significant issues in the area of financial or operational management; has not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and has not had significant issues with respect to student safety.

Every quarter FSE's facilities department performs a facility inspection using the California Facilities FIT tool which is provided by the Office of Public School Construction as an evaluation of facilities. The FIT is used to determine whether a facility is in "good repair," as defined by being clean, safe, and functional. To ensure financial transparency FSE routinely participates in a fiscal audit which is performed annually and by an external CPA firm. All audits conducted have yielded positive and clean results. To ensure accountability FSE also develops a three year static Local Control and Accountability Plan, which is the organization's strategic plan.

Stakeholder Feedback and Parent Education

When developing its policies, accountability measurements, and strategic goals it is a part of FSE's model to include their stakeholders. Stakeholders include their staff, faculty, parents and students. Annually FSE's Coordinator of Compliance will conduct: Title I Information Nights at each FSE school where parents actively participate in the writing of the parent involvement policy plan⁹; and Local Control and Accountability Plan¹⁰ Stakeholder meetings, where parents, staff and faculty can give input on how well FSE

⁹ Parent Involvement Policy Plan is policy that describes the means for carrying out designated Title I parental involvement requirements. <http://www.cde.ca.gov/ls/pf/pf/schlparentinvolpolicy.asp>

¹⁰ Local Control Accountability Plan is a strategic, comprehensive plan that connects the strategic goals, measurable outcomes, actions and budget.

met their goals and what changes they would like to see. In addition, FSE receives discretionary input and strategic goals for each school site from their advisory committees: the School Site Council¹¹ and English Learner Advisory committee¹².

Fortune School of Education takes compliance, regulatory and statutory requirements serious. It is their mission to serve its students and to ensure they are academically successful, in doing so they find it is important that they as a CMO operate at the highest level of ethics performance and operations. To ensure that they are following this model Fortune School of Education has developed a data and analytics department which also monitors state and federal compliance. FSE continues to monitor education code updates, development of new laws and education proposals both on the local and national level and has the capacity of ensuring that the current operations and curriculum is in alignment with the law and statutory guidance. In addition a straight and open line of communication is maintained always with the individuals responsible for the fiscal, curriculum and operational components of the organization.



Selection Criteria B1 - Serving the Educationally Disadvantaged

In 2015-16, 86% of FSE's students were academically disadvantaged in some way¹³.

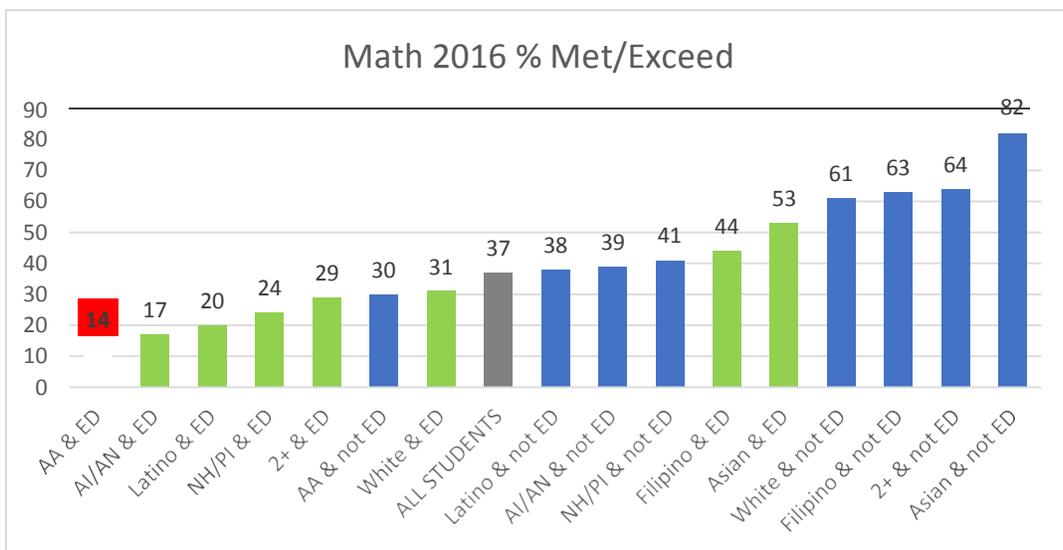
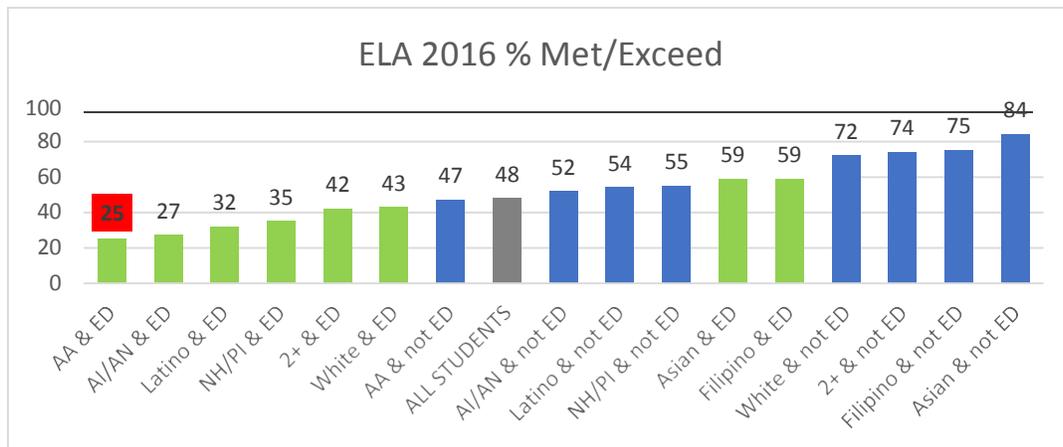
The graphs below display statewide achievement data for each racial or ethnic subgroup

¹¹ The school site council annually reviews and updates the Single Plan for Student Achievement (SPSA) including proposed expenditure of funds allocated to the school through the Consolidated Application. <http://www.cde.ca.gov/fg/aa/co/ssc.asp>

¹² A committee comprised of parents, staff, and community members specifically designated to advise school officials on English Learner program services. <http://www.cde.ca.gov/ta/cr/elac.asp>

¹³ This is based on the "unduplicated pupil count," which is data the state collects for funding purposes: <http://www.cde.ca.gov/ds/sd/sd/filescupc.asp>. The state reports the number of students who have at least one of following attributes: eligible for free or reduced price meals, foster, homeless, migrant, or

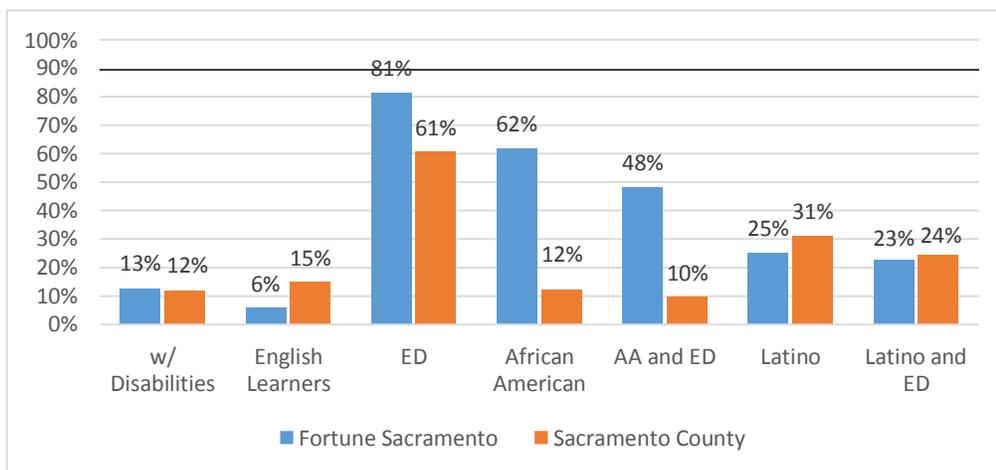
divided into its economically disadvantaged components (i.e. ED or not ED). Economically disadvantaged (ED) African-American students are the lowest performing in both subjects. This subgroup is a tiny fraction of state enrollment and composes approximately 10% of the counties in which they operate. It also describes over half of the students FSE serves.



*Figure 2*Notes: Graphs display all the racial or ethnic groups the state makes publicly available; “AA” = African-American; “AI/AN” = American Indian or Alaskan Native; “NH/PI” = Native Hawaiian or Pacific Islander.

English Learner. In 2015-16 this applied to 987 (of 1195) of our Sacramento students and 350 (of 367) of our San Bernardino students.

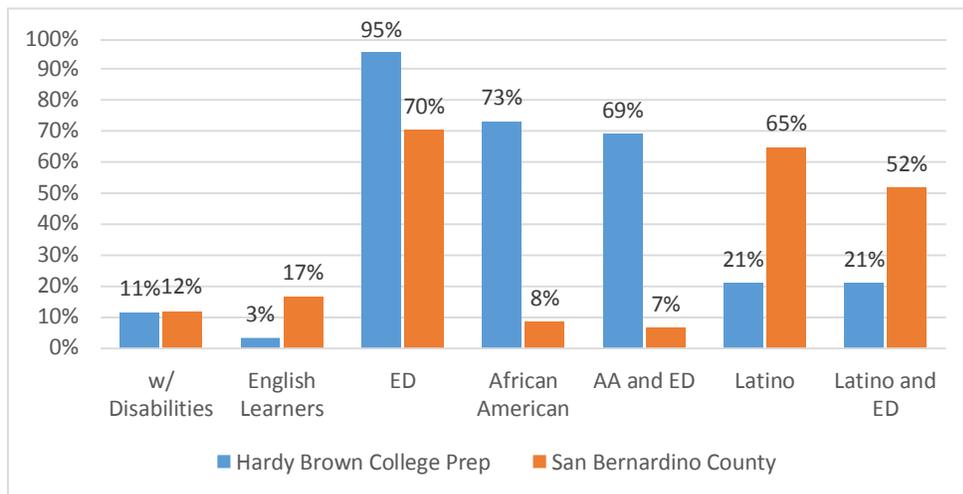
Currently, FSE serves students in two counties: Sacramento and San Bernardino¹⁴. The graph below shows the demographics of test-takers for FSE’s Sacramento school sites and the county as a whole. FSE serves nearly identical percentages of students with disabilities (13% vs. 12%). This is especially noteworthy given the fact that charter schools in California are often accused of not serving this subgroup. FSE serves a lower percentage of English Learners (6% vs. 15%) and a much higher percentage of economically disadvantaged students (81% vs. 61%). FSE serves dramatically more African-American students and almost as many Latino students – both overall and when focusing on the economically disadvantaged.



The story is similar when looking at the demographics of test-takers for FSE’s San Bernardino school site – Hardy Brown College Prep, a K-8 school – and the county as a whole. They too serve nearly identical percentages of students with disabilities (11% vs. 12%). FSE serves a lower percentage of English Learners (3% vs. 17%) and a much higher percentage of economically disadvantaged students (95% vs. 70%). FSE, in San

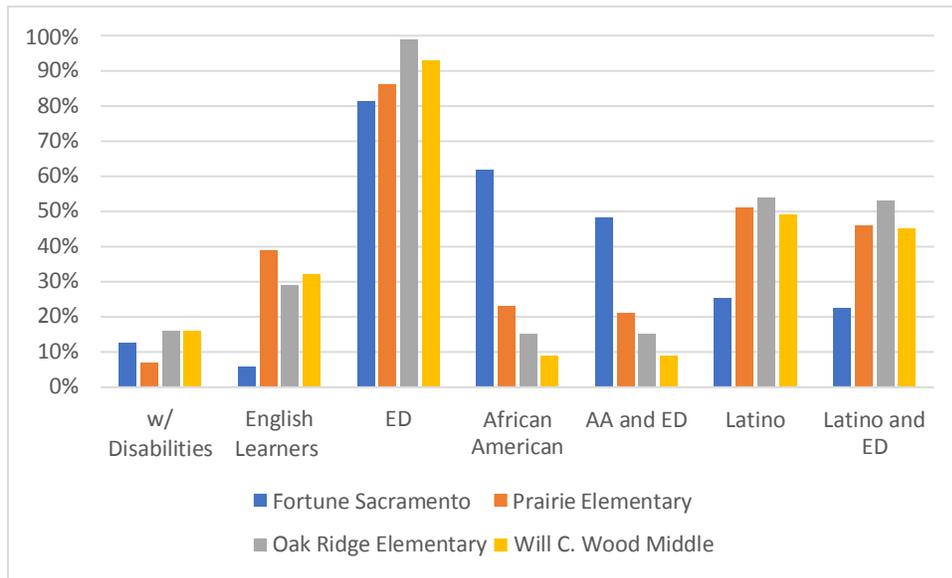
¹⁴ Fortune School of Education operates five schools in Sacramento, CA (Fortune School [K-5], William Lee College Prep [K-5], Alan Rowe College Prep [TK-6]; Ephraim Williams College Prep [6-8]; Hazel Mahone College Prep [TK-3]) and one in San Bernardino (Hardy Brown College Prep [K-8]).

Bernardino, also serves dramatically more African-American students and significantly fewer Latino students – both overall and when focusing on the economically disadvantaged. As at the Sacramento sites, Latino students compose over a fifth of our student body and are an important part of our their community.

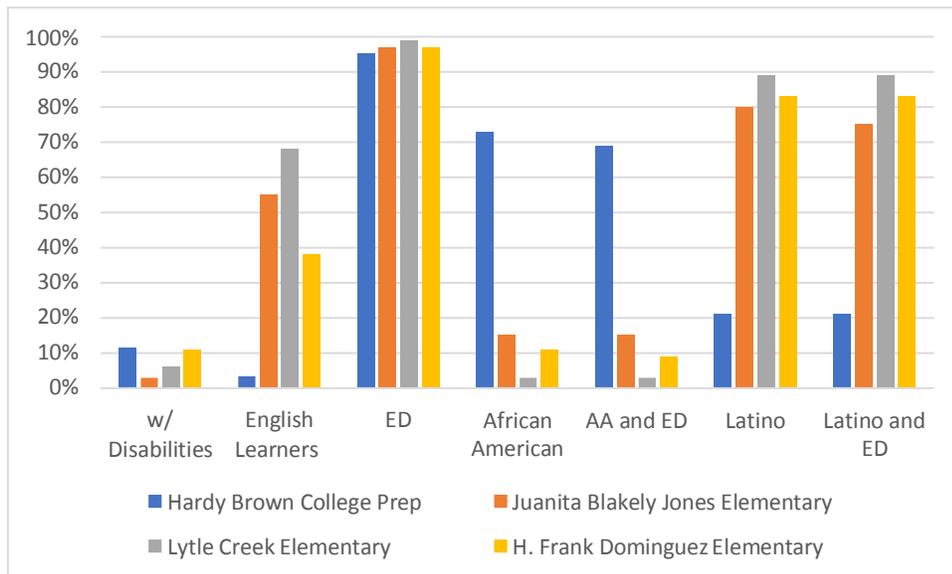


In comparison to other surrounding schools Fortune School of Education serve educationally disadvantaged students, including students with disabilities and English Learners at rates similar. Except for the economically disadvantaged subgroup, the trends are very similar to what we see in the comparison to Sacramento County. The following graph shows the comparisons to FSE schools in the Sacramento area to their surrounding public schools and FSE’s school in San Bernardino to their surrounding public schools. The charts below show the FSE in comparison to neighboring public schools.

Sacramento



San Bernardino



Selection Criteria B2 - Recruitment & Enrollment of Educationally Disadvantaged Students

Mission and Vision

Fortune School of Education (Fortune School) currently operates six schools with the mission to graduate high achieving students of good character prepared for college and

citizenship in a democratic society. FSE has set the goal of eliminating the achievement gap for historically disadvantaged and underperforming subgroups (African Americans) by increasing the availability of a rigorous, college preparatory K-12 program for these students throughout the county. True to their commitment, FSE has provided a regional solution to a regional problem by increasing the availability of rigorous, college preparatory, public school programs to educationally disadvantaged students throughout the county with the intention of replicating these schools in increasing the number of high quality seats available to educationally disadvantaged students.

Commitment to Serve Educationally Disadvantaged Students

Fortune School of Education is committed to serving educationally disadvantaged subgroups and in fact over 82 percent of our scholars qualify for free and reduced lunch. Additionally, as shown in the table below, our student population is primarily ethnic minority subgroups:

2015-16 Fortune School Enrollment by Ethnicity			
Ethnicity	Number	Percentage	County Percentage
African American	729	61%	13%
Latino	301	25%	31%
Two or More Races not Hispanic	102	9%	5%
Asian	23	2%	13%
White	13	1%	32%
Pacific Islander	7	1%	1%
American Indian or Alaskan Native	5	0%	1%
Filipino	4	0%	3%
Not Reported	11	1%	1%
Total	1195	100%	100%

As FSE continues to grow, they have seen enrollment at each of their sites increase and the percentages of African American and Latino students remain very high. Their

percentage of socio-economically disadvantaged students has dropped a few percentage points over past two years as the economy in California has improved, but it has consistently remained above 80% free and reduced lunch students enrolled. Therefore, as they expand their schools, FSE expects that these enrollment rates remain consistent.

FSE meticulously researches community demographics including: poverty rates, population growth patterns, and evidence of low performing neighborhood school in order to site our schools in the neediest areas. FSE intentionally locates its schools in low-income communities in order to improve outcomes for the most educationally disadvantaged. As an example, when FSE opened Hazel Mahone College Prep serving the Del Paso Heights community their team researched the most impoverished areas around the city where they did not yet have a school site and placed the school there. This site has proven to be a beacon of hope for this community and has brought a new level of educational achievement to the area.

As part of this project, FSE proposes to expand two existing schools and to create two new schools.

1. Expand Hazel Mahone College Prep from K-3 to K-8 during the term of the grant.

- This school is located in the north part of Sacramento serving the high needs communities of Del Paso Heights and South Natomas.
- This area has extremely high levels of poverty – 35.3 percent of people are below the poverty line, compared to 20.3 percent for all of Sacramento County

- This area has a crime rate 1.9 times higher than the average for Sacramento County
- 44.9 percent of residents in Del Paso Heights have less than a high school diploma and only 9 percent have a college degree or higher
- FSE projects that they will add 143 new high quality seats to this school

2. Open a New Middle School Serving Grades 6-8

- This school will be located in the high needs community of South Sacramento
- 45.7 percent of residents of south Sacramento are below the poverty line, compared to 20.3 percent of all Sacramento county
- 36.2 percent of residents in south Sacramento residents have less than a high school diploma and only 9 percent have a college degree and 8.2 percent have a college degree or higher
- FSE projects that they will add 325 new high quality seats to this school

3. Open Fortune Middle College High School serving Grades 9-12

- This school will be located in the high needs community of South Sacramento
- 45.7 percent of residents of south Sacramento are below the poverty line, compared to 20.3 percent of all Sacramento county
- 36.2 percent of residents in south Sacramento residents have less than a high school diploma and only 9 percent have a college degree and 8.2 percent have a college degree or higher
- FSE projects that they will add 550 new high quality seats to this school

These new and substantially expanded schools will add approximately 1,018 high quality seats to some of the neediest communities in Sacramento. These communities are starving for high quality educational options and these schools would help provide those to the neediest families.

Commitment to Recruit and Enroll Educationally Disadvantaged Students

FSE accepts all students through an open enrollment, lottery process and excludes no student due to emotional, physical, or learning disability or linguistic need as well as they never exclude any students due to racial, ethnic or economic background. In fact, FSE has been actively providing parent and caregivers with information about its special education program at all recruiting events and on their web page and other recruiting materials. FSE conducts information meetings at each of its school sites several times each spring to share information about the program with prospective parents and answer questions. These information meetings include representatives from administration, teaching staff and special education departments to ensure any and all questions can be answered. FSE includes representatives from the Special Education team to ensure that parents of students with special needs have the opportunity to have their questions answered and to ensure that students with special needs know they are welcome at their schools. In fact, FSE serves a higher percentage of students with special needs than the surrounding school districts.

FSE has also developed an English Learner Advisory Committee that includes representatives from each of its school sites, staff and faculty. This advisory committee provides feedback and advice from parents of English Learner students to ensure that FSE's practices are inclusive of all students and parents, including those whose home

language is not English. This committee is a valuable partner with school and CMO administration. In fact based on feedback from this committee over the past few years, Fortune has added additional recruitment meetings that are conducted in Spanish to answer questions from Spanish speaking families and prospective families. Fortune also employs Spanish speakers on its enrollment team so parents that are interested in applying for the schools can speak to someone in their native language. These efforts have led to an increase each year for the past five years in the number and percentage of English learner students that are enrolled in FSE's Schools.

Information meetings are a key strategy to the FSE enrollment process. The information meetings provide all parents and caregivers the opportunity to tour the campuses and receive information about FSE's instructional model, the college-preparatory environment, uniform policy and meet teachers and administrators. These meetings allow for in-depth conversations to take place and for parents to gain a deep understanding of the educational program. While the information meetings are a key component of the recruiting strategy and the time where most parents make a commitment to join the FSE family, FSE undertakes many other strategies to ensure that educationally disadvantaged students and their parents are in attendance those meetings. This requires an intentional effort to reach these families. FSE has found many different effective means to recruit these families and as part of its replication strategy will continue to implement these tactics.

Marketing and communications

FSE has found that radio, television and newspaper advertising has been very effective. FSE is strategic about which media outlets it advertises on. FSE advertises on radio and

local television stations that have higher than average viewership of African American and Hispanic families. Another primary media outlet is through the Sacramento Observer, an African American owned newspaper that is distributed throughout the African American community in Sacramento. This newspaper has significant readership within the African American community and is very well respected publication in the community. These combined strategies are consistent with FSE's desire to serve a high-minority population and have resulted in recruiting large numbers of educationally disadvantaged students from minority communities. Another effective advertising strategy to reach the educationally disadvantaged community has been to advertise at bus shelters. FSE has regularly displayed large billboards at bus stops, which provides information about FSE's programs to riders of public transportation. Social media has also been found to be highly effective. Many of the young parents at FSE have discovered our educational program through Facebook, Twitter or Instagram. These platforms have provided our recruiting team with a parent friendly way to communicate with parents to understand their needs and their student's needs. FSE routinely posts videos of school activities, informational meetings and parent training on its Facebook and YouTube channels. These videos allow parents to understand what the program is before they even set foot on a FSE campus.

FSE is also a presence in the community. Every spring, FSE's recruiting team visits African American churches throughout the community to talk about the educational opportunities and how to enroll students in the academic program. In addition to these Church visits, the **FSE recruiting team canvasses low income neighborhoods with information about the academic programs.** In these efforts, large numbers of recruiters and parent volunteers go door to door talking to prospective parents about the schools.

Recruiting an educationally disadvantaged population is a part of the FSE's DNA. It has been a core practice since the schools have been open and serving educationally disadvantaged students is the primary reason the FSE schools were created and continues to be the driving force behind everything done at the schools.

Selection Criteria C: Quality of the Evaluation Plan

The story of FSE is a story of sustainable, quality growth. They have expanded from one to six campuses while consistently serving disadvantaged students and helping them to out-perform similar students both statewide and at nearby schools. Their overall plan for the next four years is to continue this trend of sustainable growth while helping students across our system attain even better academic outcomes. FSE organized this plan into three over-arching goals:

1. Serve and Retain Academically Disadvantaged Students
2. Help Students Attain High Levels of Academic Achievement
3. Sustainably Grow the Fortune Model

How FSE Will Reach Their Three Goals

Every plan relies on a theory of action. Who is going to take what actions that we expect to result in what outputs? How will we track progress in the short- and medium-term as well as measure our success in the long-term? Writing their plan as a logic model forced FSE to make their assumptions explicit. FSE uses the terms used in the Education Logic Model developed by the Regional Educational Laboratory (REL) Pacific: resources, activities, outputs, and short-, medium-, and long-term outcomes¹⁵. Everything leads to

¹⁵ <http://relpacific.mcrel.org/resources/elm-app/>

the long-term outcomes, which FSE also call performance measures. These are how they define ultimate success. The tables below summarize how FSE plans to achieve each goal. The top portion of each table lists all the components of the logic model except for long-term outcomes. These are listed in the middle section, along with baseline results (based on the most recent data) and targets for the next four years. The bottom portion of each table explains the data collection and reporting process. We include details about how we calculate each performance measure in appendix I.

Goal 1: Serve and Retain Academically Disadvantaged Students						
<i>Resources:</i> Dynamic dashboards that show student data (demographics, persistence, ADA, behavior)						
<i>Activities:</i> Data-informed accountability meetings with principals to plan and monitor interventions; recruitment team targets neighborhoods based on demographic needs						
<i>Outputs:</i> A growing repository of operational interventions and their impact						
<i>Short-Term Outcomes:</i> Principals copy the most successful interventions and avoid unsuccessful ones						
<i>Medium-Term Outcomes:</i> More students with disabilities, more persisting Kinders, fewer chronically absent students, more plans to address students with high numbers of behavior incidents						
<i>Long-Term Outcomes:</i> See Below						
Performance Measure	Baseline	17-18	18-19	19-20	20-21	21-22
% of students who are academically disadvantaged	86% (2015-16)	86%	86%	86%	86%	86%
% of students who persist within/between school years	89%/83% (2015-16)	90%/85%	91%/87%	92%/89%	93%/91%	94%/93%
Average Daily Attendance (ADA)	94.5% (2/15/2017)	95%	95%	95%	95%	95%
Days missed because of suspensions	< 180 (2016-17)	< 180	< 180	< 180	< 180	< 180
<i>Data collection and reporting:</i> Our student information system, Illuminate, contains all this data (demographics, persistence, ADA, behavior). Dashboards report the current information.						

Goal 2: Help Students Attain High Levels of Academic Achievement

Resources: Dashboards display detailed results from NWEA and standardized local assessments

Activities: Teachers and principals use results to target interventions and identify best practices; central office uses results to evaluate curriculum and assessment system

Outputs: A growing repository of academic interventions and their impact

Short-Term Outcomes: Teachers adopt successful interventions and avoid unsuccessful ones

Medium-Term Outcomes: Higher growth and achievement on NWEA MAP assessments

Long-Term Outcomes: See Below

Performance Measure	Baseline	17-18	18-19	19-20	20-21	21-22
Academic Growth: change in Distance from Met, Smarter Balanced ELA/Math	15/-3 (2015-16)	15/15	15/15	15/15	15/15	15/15
Academic Achievement: % Met, Smarter Balanced ELA/Math	31%/24% (2015-16)	41%/30%	44%/33%	47%/36%	50%/39%	53%/42%

Data collection and reporting: The state provides student-level Smarter Balanced assessment results during the summer. We then match to students with data from the prior year to calculate growth.

Goal 3: Sustainably Grow the Fortune Model

Resources: The Strategic Data Project, a fellowship out of Harvard University that teachers participants about high-quality surveys and causal evaluations

Activities: Recruitment team pursues enrollment targets; Teachers provide feedback about job satisfaction; data team creates surveys and helps design interventions to enable causal evaluation

Outputs: Principals and central office respond to teacher feedback

Short-Term Outcomes: Teachers voice appreciation for responsiveness to their feedback; data team gets experts to provide feedback on surveys and evaluation plans

Medium-Term Outcomes: Enrollment on first day of school is above target; teachers report high job satisfaction; data team builds capacity to reliably create high-quality surveys and causal evaluations

Long-Term Outcomes: See Below

Performance Measure	Baseline	17-18	18-19	19-20	20-21	21-22
# of Students/Schools	1738/6 (2016-17)	1943/8	2281/8	2506/8	2681/8	2856/8
% of core teachers who persist within/between school years	84%/68% (2/15/2017)	85%/70%	88%/73%	91%/76%	93%/79%	95%/82%
# of High Quality Surveys	2 (2016-17)	3	4	5	6	7
# of Causal Evaluations	2 (2016-17)	3	4	5	6	7

Data collection and reporting: California calculates enrollment in early October. Human Resources maintains teacher persistence data. Data team administers surveys and conducts causal evaluations.

Method of Evaluation

FSE is currently participating in the Strategic Data Project, a two-year professional development program run by the Center for Educational Policy Research at Harvard University. Through this program, FSE's staff learns sophisticated data strategies from Harvard faculty and leading education professionals and which helps FSE to implement those strategies within their organization. Their organization is learning how to engage in robust program evaluation and is creating contacts to help vet the initial evaluation efforts. Whenever possible, FSE designs interventions proactively so that a subsequent evaluation can estimate a precise causal impact. The evaluations detailed below represent the two methodologies that can produce such valuable information.

1. Reading RTI: Regression Discontinuity

- a. In the second trimester of the 2016-17 school year, FSE began a reading intervention program for students in grades K through 3. They hired reading aides at each site and gave all students a screening test to determine who the aides would assist. Being above or below particular cut scores was the only factor that determined whether students receive a high level of assistance, a low level of assistance, or no assistance. Once NWEA results from the end of the second trimester become available, FSE can use regression discontinuity to analyze the students just above and these cut scores. This will provide robust evidence about the impact of both high and low levels of reading assistance.

2. Ability Groupings: Natural Experiments

- a. At the beginning of the 2016-17 school year, FSE decided to change the way they assigned students in grades 3 through 8 into English classes. Instead of allowing principals to choose, FSE created “ability groups” that placed students with similar prior ELA scores in the same class. They wanted to dramatically improve their ELA scores, and evidence suggested that these ability groups would accelerate growth by allowing teachers to target their instruction¹⁶. The fact that FSE schools have very different levels of enrollment in grades 3 through 8 – across and even within schools, because they are still growing – created a natural experiment. The same school can have one sixth grade class, two third grade classes, and three fourth grade classes. In addition, the same grade would often be divided into one, two, or three classes at different Fortune schools. The number of classes into which a grade is divided determines the extent to which students are clustered by ability. FSE can exploit this natural variation in enrollment to estimate the impact of our ability groups. Preliminary results from the first trimester were promising, and FSE will continue the evaluation as the school year progresses.

¹⁶ Collins and Gan (2013) find that classrooms that are more homogeneous in terms of ability tend to have higher academic growth. Instead of harming low achievers, sorting students by ability actually increases growth for low achieving students even more than for high achieving ones. Their paper contains a literature review: <http://www.nber.org/papers/w18848.pdf>

Even when FSE is unable to conduct a causal evaluation, they can use a combination of quantitative and qualitative analysis to identify possible best practices. FSE believes the way to pursue this is a system with two main components: data dashboards and intervention repositories. They have made significant progress on the first, and the system is in place for us to create the second. FSE's data team already created dashboards for principals that show a wide range of data: enrollment, attendance, behavior, assessments, etc. They plan to complete the first version of a complete set of principal and teacher dashboards by spring 2017. Their data dashboards will allow staff to do two things: identify areas of weakness and strength, and track progress over time. Relative weaknesses are areas ripe for intervention, and relative strengths are areas where staff should share their practices with colleagues. Most importantly, the ability to track progress enables difference-in-difference analyses whenever staff attempt interventions. Such analyses lack the methodological rigor necessary to determine precise causal impacts; they would not meet the What Works Clearinghouse Design Standards, even with Reservations¹⁷. However, these difference-in-difference analyses are often the best available evidence. Combined with qualitative insights, these analyses would provide preliminary estimates of impact that could guide our use of intervention repositories. FSE has not yet created the intervention repository component of their evaluation system. Their use of such a repository would be divided into three stages:

¹⁷ The What Works Clearinghouse's highest ranking – “meets standards without reservations” – requires randomized design and low sample attrition. A lower ranking – “meets standards with reservations” – allows for either sample attrition (with a randomized design) or a non-random design with baseline equivalence of the treatment and control groups. The difference-in-difference design we describe would not meet either criteria.

https://ies.ed.gov/ncee/wwc/Docs/referenceresources/wwc_procedures_v3_0_standards_handbook.pdf

1. **Build:** FSE would list practices in the repository and indicate how promising their evidence is. “Promising” here would have both a quantitative and qualitative dimension. The difference-in-difference analysis would provide the quantitative evidence, and staff observations and experience would provide the qualitative experience.
2. **Adopt:** FSE would encourage staff to adopt the most promising practices. As more staff adopt a promising practice, we obtain more difference-in-difference evidence about its impact. If the evidence continues to be positive, it would become a very promising practice.
3. **Evaluate:** The data team would help plan a more widespread adoption of a very promising practice that would produce a true causal estimate of its impact. This would use either a randomized controlled trial or regression discontinuity methodology.

The entire process does several important things; it draws upon a wide base of experimentation: every teacher and principal can try an intervention, and we can all track its progress. A public repository provides informed guidance to staff who are looking for an improvement strategy. The adoption and evaluation phases allow us to obtain increasingly precise estimates of causal effectiveness. This process maximizes the likelihood that the practices we adopt at scale will in fact have a positive impact.

Quality of Management Plan and Personnel

To ensure it meets its goals of replication and expansion of its high quality model, Fortune School of Education has a proven educational model for closing the achievement gap for educationally disadvantaged subgroups, primarily low-income African American students,

along with a seasoned leadership team with a track record of opening and managing high-quality schools. Fortune School of Education's leadership team provides each of the schools with critical operational and instructional support allowing for school leaders to focus on developing their staff and driving student achievement results. Such critical support from FSE's leadership is provided to the expanding and new schools in the following ways: **1) The recruitment of top instructional and operational staff along with providing professional development for school leadership, faculty and staff including the hiring and training of all personnel for both the academic and operational side; 2) Provide expansion and new school start-up services including fiscal services, operations and facilities and 3) Provide continuous academic, financial and operational support**

Recruitment of Quality Professionals and Educators

Fortune School of Education's Human Resources department is committed to recruiting quality instructional and operational staff that is committed and dedicated to the mission. FSE is an organization that does not make excuses and does not hide its mission to close the academic achievement gap of the lowest performing subgroup (African American students). Those who are considered for an opportunity with FSE must undergo a rigorous yet necessary hiring process which can include both a panel and/or one-on-one interview and a demo lesson with actual FSE students. Such process allows for FSE to find the most qualified and strongest candidates that are committed to the mission and vision of raising and preparing college and work-ready students.

Professional Development

Providing teachers and school leaders with the ongoing professional development, coaching and planning time they need to be successful implementing our instructional program to fidelity is a part of the Fortune model. FSE provides professional development through our Curriculum and Instructional Department as well as credential and master's degree programs. All teachers including newly hired can expect:

- Participate in a summer and spring symposiums, which are an all-staff multiple day conference focused on the culture and system-wide initiatives.
- Receive professional development and coaching on their Common Core aligned instructional materials.
- Have daily and weekly planning time
- Be assigned a Master Teacher to provide coaching and model lesson plans
- Have the opportunity to advance to school leadership through our school leadership program.
- Receive professional development every Wednesday
- Participate in fall, spring and summer Institutes at the campus level where hands on professional development is provided.
- Be enrolled in T-School, a summer planning institute and reading initiatives that new and struggling teachers can participate in and implement within their classrooms.

Expansion and New School Start-Up Support

To ensure that our schools expand and open maintaining the quality and high expectations of our model, Fortune School of Education has developed a highly effective

network configuration, which provides individual school sites and leaders with the autonomy to lead their unique schools coupled with a home office to provide critical support in key functional areas to ensure all schools are working efficient and effectively towards our shared mission. FSE’s home office (headquarters) provides all support in fiscal services, operations, community engagement, recruitment, professional development and facilities. FSE has developed a comprehensive Management Plan that will ensure the proposed project is completed on time, within budget and at a high level of quality. This management plan will be carried out by FSE’s home office team in collaboration with site leadership. The table below illustrates the major activities and *timelines for this CSP project:*

Timeline Legend:	
HO	Home Office (Headquarters)
HMCP	Hazel Mahone College Prep – Expanding K-8 school
MS	New Middle School
ECHS	Rex and Margaret Fortune Early College High School (New School)

Task	Milestones	Person Responsible	Timeframe	PY 1	PY 2	PY 3	PY 4	PY 5
CMO Capacity Building and Compliance								
Grant Administration	Train Staff Involved in Grant Administration	CEO, Project Director	Oct - Dec	HO				
	Ongoing PD in financial and grant management	CEO, Project Director	Jan, May		HO	HO	HO	HO
	Submit Annual Reports	Project Director	June	HO	HO	HO	HO	HO

	Travel to annual projector directors meeting	Project Director	TBD	HO	HO	HO	HO	HO
New and Expanding Schools								
Staffing	Create and post job descriptions	HR Office	Sept, Jan	HMCP	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS
	Screen Candidates	HR Office	Sept, Jan - April	HMCP	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS
	Hire Teachers	HR Office	Jan - April	HMCP	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS
Professional Development	Planning year with extensive PD for the school leader	Director, Curriculum Instruction, CEO	Aug-July	MS, ECHS				
	Pre Opening PD for all staff	Director, Curriculum Instruction, CEO	Aug	HMCP	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, MS, ECHS
	Year long PD Plan	Director, Curriculum Instruction, CEO	Aug	HMCP, MS, ECHS				
Enrollment	Develop system-wide enrollment Plan	CEO, Project Director, Recruiting Director	Aug-Feb	HMCP, MS, ECHS				
	Hold Lottery and Send acceptance Letters	CEO, Recruiting Director	Mar	HMCP, MS, ECHS				
	Hold enrollment meetings and registration	Recruiting Director	Apr-June	HMCP, MS, ECHS				
Facilities	Complete Tenant Improvements	CFO, CEO	Aug - Jan	HMCP, MS, ECHS	HMCP, MS, ECHS	ECHS		

	Furnish and outfit classrooms	CFO, CEO	July	HMCP, MS, ECHS	HMCP, MS, ECHS	HMCP, ECHS	HMCP, ECHS	HMCP, ECHS
Evaluation	Administration of internal and external academic assessments	Director of Data and Analytics	Sept-Jun	HMCP, MS, ECHS				
	Administration of stakeholder surveys	Director of Data and Analytics	April	HMCP, MS, ECHS				
	Collection of Attendance, dropout, enrollment, college readiness, state and local assessment data	Director of Data and Analytics	June	HMCP, MS, ECHS				
	Qualitative evaluation and focus groups with teachers, parents and other stakeholders	Director of Data and Analytics	June	HMCP, MS, ECHS				
	Analysis of Fiscal Health	CFO, CEO, Director of Data and Analytics	Sept, Dec, March, June	HMCP, MS, ECHS				

Operational and Academic Support

The FSE Management Team has developed a multi-year strategic plan that provides institutional direction, accompanied by a multi-year business plan that allows FSE to maintain and grow its network while ensuring strong operations, high-quality programs, and financial stability. The FSE home office will continue to provide support in academics, fiscal services and operations. Fortune School of Education is a fiscally sound and

responsible local education agency (LEA) with superior management competence – including a leadership team to support the rapid growth of its high-quality charter school model while increasing student achievement and closing the achievement gap. Fortune School of Education recognizes the complexities of opening a new school and knows that its success is contingent upon the coordination and “all hands on deck” mentality. Each new school and or school expansion has been officially approved by FSE leadership, Board of Directors and uniquely by the County authorizers within the Charter. In the process of opening a new school FSE’s leadership works closely with authorizers, partners and the community. Prior to opening a new school FSE leadership also assess the current schools in operation to ensure there is a full understanding of the need and demand for future schools and the capacity of the overall organization to support the growth associated. Having opened six schools who have expanded each year until reaching sixth or eighth grade FSE has created a model plan that allows them to successfully identify all the necessary components to successfully opening a school. For new schools such as the Early College High School, Fortune School of Education has created a high school taskforce team. This team is responsible for providing the necessary tools and providing one hundred percent of the operations involved.

Multi-year Financial Projections

A multi-year financial and operating model for the organization, a demonstrated commitment of current and future partners, and evidence of broad support from stakeholders; **the budget captures the costs of opening a new Middle School, a new Middle College High School, and significantly expanding one existing school. The project will add nearly 1,018 seats in the high-quality FSE network and create a**

high school where students can complete their K-12 education with FSE, while earning a high school diploma and an Associate's degree through our partnership with Cosumnes River College. This project will take place over a five year period from 2017 through 2022.

Fortune School requests approximately \$2 million over five years for the grant activities described in this application and further detailed in the budget and budget narrative. Approximately 81 percent of the funds will be used directly to purchase equipment, technology and supplies to directly serve students in the classrooms. Ten percent of the costs associated will be used for direct personnel costs to serve students in the classroom and provide additional training. Ten percent of the costs have been budgeted to for advertising and recruitment to ensure that every community knows about the opportunity to enroll in the school and to provide transportation to students from impoverished neighborhoods to attend FSE schools.

Beyond the grant period, FSE Schools will continue to be operated locally, with the majority of the operative expenses covered by state and federal funding. Please see Appendix H for supplemental budgets and financial information. This includes clean financial audits and a three year operating budget.

The Fortune School of Education has many significant partners from a variety of stakeholder groups, including broad community support, political support, support of external funding entities, advocacy organizations as well as university leaders. As demonstrated in Appendix C, we have received letters of support from several organizations including the charter network accelerator and the California charter schools

association. We also have significant support from other LEA's and institutions of higher education as demonstrated in Appendix H. The *Sacramento Observer* is a strong community partner with FSE and is a weekly newspaper with a circulation of 50,000 that has served Sacramento's African American community since 1962. As longtime advocates of public education, The Sacramento Observer has lent its full endorsement to this effort to create nine college preparatory charter schools to prepare African American students for promising and productive futures. **FSE also have strong community partners in the higher education community.** FSE has recently entered into partnerships with both a local community college and a California State University. These partnerships will ensure an articulation of a college ready curriculum for the students at the new Middle College High school. The institutions have shown their strong support for the FSE program and its continued expansion as part of these agreements shown in Appendix C.

A Plan for Closure of Underperforming Schools

The Fortune School of Education expects that each and every one of the schools in its network are high performing, following the five pillarsⁱ and following our curricular and extra-curricular expectations with fidelity. The Fortune School home office team takes a proactive stance towards ensuring high-quality within its schools. The home office team provides extensive support to the schools in Curriculum and Instruction, Data and Analytics, Recruitment, Community Engagement, Human Resources and Finances. The home office team is also extremely involved in training up the next generation of teachers and school leaders through the District Intern Credentialing program, where Fortune School has the authority to train teachers and prepare them through coursework and

supervision to earn a teaching credential. Intern teachers in this model can work in a classroom while gaining necessary experience to earn their teaching credential. Fortune School of Education also runs an administrative credentialing program where prospective school leaders can earn an administrative credential. This allows us to train the next generation of school leaders.

Should a school struggle to meet the high standards we set for all of our schools, Fortune School home office team would provide increasing levels of intervention to assist improvement efforts. This would include increased time on site by home office team members and additional support from the curriculum and instruction team through increased observations in classrooms and training of teachers. If a school were to struggle with meeting enrollment targets, our community engagement and recruitment team would assist through increased marketing and recruiting to identify and enroll additional students.

Should a school be unable to improve despite these increased supports, Fortune School of Education has established clear guidelines for school closure.

Closure of the charter school will be documented by official action of the FSE Board of Directors. The action will identify the reason for closure. The official action will also identify an entity and person or persons responsible for closure-related activities. The FSE Board of Directors will promptly notify staff, parents and students of the charter school, resident districts, the Sacramento County Office of Education, the charter school's SELPA, the retirement systems in which the charter school's employees participate (e.g., Public Employees' Retirement System, State Teachers' Retirement System, and federal social security), and the California Department of Education of the closure as well as the

effective date of the closure. The FSE Board will ensure that the notification to the parents and students of the charter school of the closure provides information to assist parents and students in locating suitable alternative programs. This notice will be provided promptly following the FSE Board's decision to close the Charter School.

Qualifications of Key Personnel

Fortune School of Education Chief Executive Officer, Senior Management Team and School Site Principals will each play an integral role in the replication and expansion of the Fortune School of Education charter school portfolio. Each of these experts in their field bring an level of expertise and experience in support of Fortune Schools across the sectors of educational program, data and assessment, instruction, curriculum, community engagement, finance, development, and fundraising. Together these leaders have a proven track record of operating the District Intern Credentialing program for over 20 years and operating charter schools for over 6 years.

Margaret Fortune

Chief Executive Officer/ Founder

As one of the founders of Fortune School of Education, Ms. Fortune leads the organization with a passion and vision like most inspiring leaders. Since FSE has opened their doors, Ms. Fortune leads a network of charter schools in Sacramento and San Bernardino, California that were created to close the African American achievement gap. In addition, she also leads a non-profit graduate school of education with locations in Sacramento and the California Bay Area with credential programs for teachers and principals with master's degrees in partnership with University of Pacific. Throughout her career, Ms. Fortune has served as the senior advisor to the governor in which she was

responsible at advising the governor on education and urban policy; Director of Public Affairs, where she produced the Governor's education events and relationships with the Black press and tribal governments and Director of the Governor's Initiative to Turn Around Failing Schools, where she was responsible for promoting school reform strategies, such as charter schools. Other related experience includes her being a consultant for the California Charter School Association, Superintendent of St. Hope Public Schools in California, Director of Northern California Teacher Recruitment and Assistance Director of the teacher credentialing Program for Project Pipeline and Assistant secretary for the Office of the Secretary for Education in the Office of Governor Gray Davis. As a current board member of the California Charter School Association, previous trustee of the California State University Board of Trustees. Ms. Fortune's community involvement and professional board experience also help shape her into the dynamic leader she is. Ms. Fortune earned her Bachelor of Arts in Political Science from University of California, Berkley and her Master degree in Public Policy from Harvard University.

Bonnie Benson

Chief Financial Officer

Ms. Bensen comes with over 28 years of experience in finance and accounting, six of which have been with the FSE team. Here at FSE, Ms. Bensen is Responsible for all aspects of Fortune School of Education's finances including budgeting, financial statement preparation, state financial and attendance reporting. Other responsibilities include management of insurance policies and development of charter school facilities. Prior to joining the FSE family Mrs. Bensen worked as a Certified Public Accountant

where she consulted for many local education agencies throughout the Sacramento region where she helped develop policies, procedures and completed various accounting projects. Her experience also expands to working for one the “Big Four” accounting firms Earnest and Young as a senior accountant. Ms. Bensen has a Bachelor of Science Degree in Accounting from Santa Clara University.

Michelle Grace

Chief of Operations

With her knowledge, experience and passion for the mission and vision of FSE Fortune School of Education’s daily operations runs smoothly because of Mrs. Grace. At FSE she oversees facility management. Human resources, legal affairs, student admissions, information and technology, branding, credentialing, procurement and administrative operations. In her career at FSE she has assisted in the opening of two successful charter schools by providing high quality operational management and led an \$80K branding project at FSE. Most recently, Mrs. Grace is the chair of the middle college high school task force where she organizes and helps delegate and implement the needed tasks as FSE prepares to open up a middle college high school in Elk Grove, California for the 2017-18 school year.

Matt Taylor – PROJECT DIRECTOR

Director of Data and Analytics

As the director of Data and Analytics, Mr. Taylor works to provide data to guide strategic decisions. Focused on implementation of student assessment, data systems, and student information systems, facilitating the training of principals and teachers on effective uses of data to drive improvements in teaching and learning. Prior to joining FSE Mr. Taylor served as the Director of Research for the California Charter School Association,

Education Research and Evaluation Administrator for the California Department of Education, Deputy Inspector General for the Office of Inspector General and an Education Programs Consultant. In addition to his vast array of experience he is an Elected Trustee for the Yolo County Board of Education. Mr. Taylor earned his Masters of Public Policy from Pepperdine University and his Bachelor of Arts in Political Science and Economics from Linfield College.

Lisa Strong-Dodson

Chief Human Resources Officer

As Fortune School of Education’s Director of Human Resources, Mrs. Strong-Dodson oversees all the FSE’s recruiting, hiring, processing of benefits, workers compensation claims, maintaining personnel files, problem solving with employees, tracking of sick and vacation leave, coaching and training staff. With over 230 employees Lisa utilizes her over 15 years’ experience to ensure that FSE is a healthy, positive and productive workplace. In addition to her 15 years of experience in the world of human resources, Lisa bring extensive experience and knowledge with over 10 years of experience in credential analysis and over 25 years of experience serving individuals with disabilities, project management, and client relations. She is the spearhead of all professional development for all faculty and staff and continues to look for those in the community that are a perfect fit with FSE’s mission and vision. Lisa earned her Bachelor of Arts in Behavioral Science and participated in graduate level coursework in Human Resources Management at the University of California, Davis.

Wesley A. Pepper

Director of Curriculum and Instruction

With close to a decade of experience in education, as a teacher leader and designer of curriculum Mr. Pepper brings a vast amount of knowledge and professional experience that allows him to design the curriculum and instructional format that makes FSE so successful at educating their students. Wesley has supervised faculty in the teacher credentialing program and facilitators in the CCSS Common Planning Time for Charter School Teachers; developed and implemented professional development for Common Core State Standards, Data Driven Instruction, Technology in the Classroom and Classroom management. Wesley has earned his Bachelor of Arts in American Multi-Cultural Studies from Sonoma State University as his Masters in Teaching from Pace University in New York. His credentialing experience through FSE gives him a unique blend of experience and knowledge of the organization which allows him to be successful.

Kristy Pruitt, PhD.

Director of Teacher Education

As FSE's Coordinator of Teacher Education, Dr. Pruitt leads the organization's graduate school, which includes Teacher Credentialing, Master's Degree and School Leadership Programs. As former Director and Professor in Northern New Mexico she coordinated, facilitated and supervised student teaching, and administered field practicum placements for teacher candidates. Dr. Pruitt also has experience in teaching courses, seminars, workshops for teacher candidates and facilitate professional development for school districts. With over 20 years of experience at the K-12 and higher education levels including involvement with educational initiatives within six states and two countries. Dr. Pruitt holds a Doctor of Education, Master of Education with a double major in English and a Bachelor of Science in Education (Language Arts and Science), and an endorsement in TESOL.

Odisa A. Nyong

Principal – Early College High School Principal

Mr. Nyong has been with the FSE family since 2012 as the principal of the first charter school opened in the Sacramento area. Serving as an instructional leader of the school, responsible for supervising faculty and staff, and analyzing assessment data to guide pupil instruction. Mr. Nyong collaborates with faculty and other staff to ensure a culture of high expectations at their school. Most recently, Mr. Nyong was announced as the new principal of the Early College High School expected to open in the 2017-18 school year. Before joining the FSE team, Mr. Nyong brings with him over ten years of experience in education. He began his career in education as a classroom teacher and physical education instructor at PS7 Elementary, where he was promoted to Dean of Students. Native of Sacramento, Mr. Nyong graduated with his Bachelor of Arts in Economics from Sacramento State University and earned his teaching credential through Fortune School of Education.

Joseph M. Gambino

Principal – William Lee College Prep

With almost a decade in the elementary education and technology as it relates to education, Mr. Gambino leads network school William Lee College Prep. Daily Mr. Gambino delivers a breadth of knowledge in instructional strategies which lead students to standards mastery; utilizes educational technology to engage and create learning opportunities for all students. In addition to running a school, Mr. Gambino currently serves as the co-chair for FSE's technology initiative and provides professional development to teachers and staff throughout the charter school network. Mr. Gambino earned his Bachelor of Science in Elementary Education from Shippensburg University

and is currently enrolled within the School Leadership Program through Fortune School of Education.

Marcus Atkins

Principal – Ephraim Williams College Prep Middle School

A home-grown leader, Mr. Atkins native to the Sacramento region is the middle school principal where he works closely with the his staff, faculty to build an atmosphere that promotes a college-going culture and scholastic achievement. At Ephraim Williams, Mr. Atkins continues to come up with innovative ways to promote parent involvement and works closely with the Dean of Students to implement a comprehensive intervention program to reduce retention. Mr. Atkins started his teaching career as a sixth grade math teacher at PS7 Middle School and later at Fortune School as a fourth grade teacher-leader. Mr. Atkins has a Masters of Arts in Curriculum and Instruction, his Bachelor of Science in Business Management from Hampton University, his teaching credential from Fortune School of Education, his Masters and is a former fellow of the School Leadership Program hosted by Fortune School of Education.

Toiya Allen

Principal – Hardy Brown College Prep

In 2013, Ms. Toiya Allen became the principal of Hardy Brown College Prep located in San Bernardino, CA. There she works collaboratively with her faculty and staff members to develop strategic ways to teach and involve parents within the classroom and abroad. Prior to becoming the principal. She worked as a BTSA Support Provider, Administrator on Duty and Lead teacher at Hardy Brown College Prep. Ms. Allen’s teaching experience for the past ten years helps make the operations and positive outcomes at Hardy Brown College Prep possible. Ms. Allen holds her Bachelors of Business Administration from

California State University, Fullerton, earned her Teaching credential from Azusa Pacific University and her administrative credential from Fortune School of Education.

Tamara Williams

Principal – Hazel Mahone College Prep

Ms. Williams has been a member of the FSE family since 2013 where she began her FSE career as a teacher and became the principal of the newest school within the Charter School network Hazel Mahone College Prep. As the principal Ms. Williams brings over 14 years of educational experience that has effectively helped the leadership and daily operations of the school. Ms. Williams Received her Bachelors from the University of California, Davis and her Multiple Subject Teaching Credential from Chapman University, in Concord.

Min Owens

Principal – Alan Rowe College Prep

Mrs. Owens began her career as a Master Teacher for FSE where she supported all K-2 FSE teachers in the area of academics and behavior. She has also facilitated the kindergarten team which consisted of 13 kindergarten teachers. In addition to being a master teacher, she was also an instructor for the FSE District Intern program. Mrs. Owens has over 25 years in teaching and coaching experience and extensive experience as a reading specialist. Mrs. Owens received her Masters Degree in Education from American College of Education, Reading Specialist Certification from National Louis University, teaching credential from National University and her Bachelor of Arts Degree in communication from Sacramento State University.

Kim Howard

Principal – Fortune School

Ms. Howard will be the principal of Fortune School July 2017. Ms. Howard's solid educational foundation in pedagogy, passion for student learning and over ten years of classroom and administrative experience make her an incredible asset to the FSE Leadership team. Before becoming principal, Ms. Howard was a teacher at Fortune School where her students increased their performance on the NWEA and Smarter Balanced assessments continually. Her last year's class of third graders achieved a math proficiency level of 62%, the highest in the FSE system on the Smarter Balanced assessment. In addition to being a classroom teacher Ms. Howard also worked as a Master Teacher in ELA for FSE's elementary schools. Ms. Howard has a B.S. in Computer Science, a Multi-subject Teaching Credential and her Administrative Credential.

ⁱ See appendix for Five Pillars Model