

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

Status: Submitted

Last Updated: 06/29/2017 02:04 PM

## Technical Review Coversheet

Applicant: Fortune School of Education (U282M170042)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
1. Quality of Applicant	45	34
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	22
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	7
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	19
<b>Sub Total</b>	<b>100</b>	<b>82</b>
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	3
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	<b>8</b>	<b>3</b>
<b>Total</b>	<b>108</b>	<b>85</b>

# Technical Review Form

Panel #3 - Charter Management Organization - 3: 84.282M

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

Applicant: Fortune School of Education (U282M170042)

## Questions

### Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 34

#### Sub Question

1. The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, as amended by the ESSA, attending the charter schools the applicant operates or manages.

#### Strengths:

The longer all students and student subgroups are at the applicant's schools the better they perform academically showing they are 3-4% more likely to meet standards after four years. (e33)

#### Weaknesses:

The applicant does not provide evidence related to graduation rates.

Reader's Score: 9

2. The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available, student academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.

#### Strengths:

Many of the applicants subgroups outperform the state and most at least tie the state on statewide assessments. (e35)

Two subgroups outperform the state in ELA and Math and those subgroups account for 81% of the school's test takers. (e35)

Students with disabilities at the applicant's schools outperform the state in Math. (e36)

#### Weaknesses:

Students with disabilities scores in ELA and most of the scores for students who are economically disadvantaged do not exceed the state average. (e36-37).

Reader's Score: 10

**Sub Question**

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

**Strengths:**

The applicant's schools have an outstanding record in this regard with no issues noted in any area. They have an excellent record of getting their charters renewed, providing a safe environment for students and remaining financially and operationally sound. (e37-39)

**Weaknesses:**

No weaknesses noted.

**Reader's Score: 15**

**Selection Criteria - Assisting Educationally Disadvantaged Students**

- 1. The significance of the contribution the proposed project will make in expanding educational opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary**

**Reader's Score: 22**

**Sub Question**

- 1. The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

**Strengths:**

The applicant's students outperformed the state by 6% in ELA. (e29)

The applicant's students matched the state performance in Math across subgroups. (e29)

86% of the applicant's students are educationally disadvantaged across their schools. (e39)

They serve almost the same percentage of students with disabilities 12% vs 13% in their schools as the surrounding schools do. (e41)

**Weaknesses:**

The applicant's schools serve a much lower percentage of English Language Learners 6% vs 15% as compared to the local district. (e41)

**Reader's Score: 7**

- 2. The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.**

**Strengths:**

The applicant intentionally places schools in the communities where the most educationally disadvantaged students live. (e45)

The applicant employs Spanish speakers on the enrollment team. (e48)

### Sub Question

The applicant targets Radio, TV and Newspaper advertising to reach the parents of educationally disadvantaged students. (e49)

The applicant has also effectively utilized advertisements at bus shelters and engaged parents through social media. (e49)

They also target churches serving people from educationally disadvantaged backgrounds.(e49)

#### Weaknesses:

No weaknesses noted.

**Reader's Score: 15**

### Selection Criteria - Quality of the Evaluation Plan

- 1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the proposed grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.**

#### Strengths:

The applicant's evaluation plan is closely aligned to the logic model. They provide specific details on resources, activities, outputs, short-term outcomes, medium-term outcomes and long-term outcomes. (e51-53)

The applicant's partnership with Harvard University provides a strong support for their evaluation plan. (e53-56)

#### Weaknesses:

The applicant is relying on the Harvard partnership but it only lasts for two years and it is unclear what will happen when that partnership ends.

**Reader's Score: 7**

### Selection Criteria - Quality of the Management Plan and Personnel

- 1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—**

**Reader's Score: 19**

### Sub Question

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

#### Strengths:

The applicant's management plan details which staff are responsible for each specific project task and in what timeline the task must be complete. They also provide clear allocations of their funds allowing them to stay well within budget. (e59-61)

## Sub Question

### Weaknesses:

A number of milestones are assigned to the HR Office rather than to a specific person. (e60)

Reader's Score: 4

2. **The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and**

### Strengths:

The applicant's key personnel have extensive experience in opening and running charter schools in a fiscally sound manner. (e66-74). Their experience both in education and operations spans many decades. They have extensive experience with projects that equal or exceed the scope of this project (e66-74).

### Weaknesses:

No weaknesses noted.

Reader's Score: 10

3. **The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model included in the applicant's response to application requirement (g).**

### Strengths:

Only 10% of the costs are for personnel. These will be covered by state and federal funding after the grant period. The rest of the costs are temporary or one time and will end when the grant period does (e63)

### Weaknesses:

No weaknesses noted.

Reader's Score: 5

## Priority Questions

### Competitive Preference Priority - Promoting Diversity

1. **This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).**

**Note: For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" ([www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).**

### Strengths:

The applicant plans to recruit in specific organizations serving diverse populations including Head Start Programs and particular churches. This will allow the applicant to make connections with students and families that will provide their schools with a racially and socioeconomically diverse student body. (e24)

This application was thoroughly discussed with respect to each selection criterion and priority. My scores reflect my professional assessment of the application with respect to those criteria and priorities.

**Weaknesses:**

The applicant serves significantly less English Language Learner students than the district though the numbers they serve are increasing. (e24-25)

**Reader's Score:** 3

**Competitive Preference Priority - School Improvement through Turnaround Efforts**

**1. This priority is for applicants that both:**

**(a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and**

**(b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public schools during the project period, to do so by replicating a successful charter school model for which the applicant has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-performing public school at the time of restart are exempt from the charter school's lottery.**

For purposes of this priority, academically poor-performing public schools may include, but are not limited to, persistently lowest-achieving schools, as defined in this notice and the final requirements for the School Improvement Grants (SIG) program under Title I of the ESEA (<https://www.federalregister.gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act>); and priority schools in States that exercised flexibility<sup>1</sup> under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at [www.ed.gov/esea/flexibility](http://www.ed.gov/esea/flexibility), and the Office of Elementary and Secondary Education's December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

**Note:** For applicants proposing to use CMO grant funds to replicate a high-quality charter school by restarting as a charter school one or more academically poor-performing public schools, the CMO's proposed charter school must be newly created and operating under a separate charter and governance than the academically poor-performing public school.

**Footnote 1:** As of August 1, 2016, States may no longer exercise flexibility, except in the limited circumstances where they implemented interventions previously in priority schools under the SIG program. For additional information related to ESEA flexibility and interventions in priority schools, see section B of the Department's June 29, 2016 guidance entitled, "Transitioning to the Every Student Succeeds Act – Frequently Asked Questions," at <http://www2.ed.gov/policy/elsec/leg/essa/essafaqtransition62916.pdf>.

**Strengths:**

The applicant did not respond to this priority.

**Weaknesses:**

The applicant did not respond to this priority.

**Reader's Score:** 0

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Status: Submitted

Last Updated: 06/30/2017 03:07 PM

## Technical Review Coversheet

**Applicant:** Fortune School of Education (U282M170042)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
1. Quality of Applicant	45	31
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	22
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	6
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	19
<b>Sub Total</b>	100	78
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	0
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	8	0
<b>Total</b>	108	78



# Technical Review Form

Panel #3 - Charter Management Organization - 3: 84.282M

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

Applicant: Fortune School of Education (U282M170042)

## Questions

### Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 31

#### Sub Question

1. The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, as amended by the ESSA, attending the charter schools the applicant operates or manages.

#### Strengths:

Review of the changes in student performance from 2015 to 2016 reveal that students enrolled at Fortune School of Education were seven percent more likely to increase their academic achievement in ELA. Evidence from Smarter Balance Assessment System reveals that seven of the nine subgroups achieved increases in ELA when compared to the prior year. Students with English Language Learning needs attained the largest increases at +29. Additionally, economically disadvantaged Hispanic and African-American subgroups experienced growth of ten and seven percent respectively. Increases of less than six percent include the following subgroups: economically disadvantaged; Hispanic (whole-group); multi-racial (whole group); and economically advantaged African-American and Hispanics (page e29).

In math, three of the nine subgroups experienced increases when compared to the prior year. English Language Learners (+14), economically disadvantaged Hispanics (+9), and Hispanic (+18) students experienced growth in math. (page e30)

To justify the network's impact on its students, an analysis was conducted to compare fourth grade students where half [of the students] have been with the network since kindergarten while the remaining students have only been with the network for an average of two-years. Evidence suggests that students enrolled at the school for five-years are three times more likely to meet academic standards. Additionally, the students were also more likely to meet the academic standards of students in other school districts. (page e31)

#### Weaknesses:

ELA data revealed that the achievement results for students identified as multi-racial and economically disadvantaged as well as those with disabilities were flat. (page e29)

While the ELA results indicate that students are 7% more likely to experience academic growth, the math results are relatively flat. Students at Fortune School of Education students are only 1% more likely to attain growth in math, when compared to the prior year scores. (page e30)

## Sub Question

Four out of the nine subgroups experienced academic attainment decreases in math over that last year. Evidence suggests that multi-racial, economically disadvantaged students realized the largest decreases in math (33) (page e30). Academic losses were across the following subgroups were: multi-racial (15); economically disadvantaged African-American (7); and economically disadvantaged (4). Results for African-American (whole subgroup) and diverse learners were flat. (page e30)

Fourth grade students with an average of two-years of education at Future School of Education underperform their peers at the city and neighboring school districts in both math and English. (page 32)

**Reader's Score:** 8

- 2. The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available, student academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.**

### **Strengths:**

In California, academic achievement subgroup data is available at the state level. The application asserts that the network's ELA performance outperforms the state by six percent. A review of the subgroup data indicates that economically disadvantaged Hispanic students outperformed their peers (+38 to +32). (page e35)

Four of the six subgroups achieved increases in Math when compared to the state. Hispanic students experienced double-digit growth. Hispanics (whole subgroup) and economically disadvantaged Hispanics outpaced their peers (+17% and +12%). Math proficiency scores exceed the state with the following subgroups: African-American (AA) students (+21 to +18) and AA students who are economically disadvantaged. (page e36)

### **Weaknesses:**

It would be helpful if the applicant provided alternative data to aid in assessing the network's academic growth. (page e30) The grade configuration limits the network's ability to report high school graduation and college enrollment/persistence.

The applicant affirms that the network's ELA scores are better than their state peers. However, five of the six subgroups have proficiency scores that are either on par or lower than the state. In ELA, student academic performance lags the state in the following subgroups: special education (+9 to +13); economically disadvantaged (+30 to +35); African-American (+27 to +31); economically disadvantaged African-Americans (+26 to +25); Hispanics (+37 to +37). In Math, students with diverse learning needs underperform in comparison to their state peers (+7 to +11). (page e35 – 36)

In Math, when comparing Fortune School of Education's proficiency standards to the state, students with diverse learning needs trail their peers (7% to 11%). Economically disadvantaged students perform on par with their state peers (+24 to +23). (page e36)

**Reader's Score:** 8

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

#### Sub Question

##### **Strengths:**

Of the six schools with the FSE network, none of the school has been closed, revoked, voluntary surrender of the charter because of noncompliance to academic, fiscal, and/or operational concerns. (page e37)

##### **Weaknesses:**

There are no weaknesses noted.

**Reader's Score: 15**

#### **Selection Criteria - Assisting Educationally Disadvantaged Students**

- 1. The significance of the contribution the proposed project will make in expanding educational opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary**

**Reader's Score: 22**

#### Sub Question

- 1. The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

##### **Strengths:**

In 2015-16, eighty-six percent of Future School of Education students were academically disadvantaged. (page 39). Documented in the application, Future School of Education stated that it aims to close the achievement for African American students the school serves (page e15). As such, the network serves more African-American students when compared to the respective counties and surrounding public schools.

In Sacramento county, Fortune School of Education serves more economically disadvantaged (+20); African-Americans (+50); and economically disadvantaged African-Americans (+38). (page e41) In San Bernardino county, Fortune School of Education serves more economically disadvantaged (+25); African-Americans (+65); and economically disadvantaged African-Americans (+62). (page e42) Moreover, in both counties, the network enrolls more African-American and economically disadvantaged African-Americans when assessed against neighboring public schools. (page e43)

The application presents data that reveals the network enrolls many students who receive free and reduced lunch. Data evidenced in the documents indicate the following numbers: 81% in FSE Sacramento versus the county's 61% and 85% in FSE San Bernardino compared to the district's 70%. (page e20). When compared to a cohort of 93 similar schools, FSE serves more educationally disadvantaged students. Ninety percent of the students enrolled at FSE are economically disadvantaged, while, in similar schools, 84% of the students are economically disadvantaged. (page e104).

Across the five schools in Sacramento, 12% of the students have diverse learning needs, which is on par with the county (~13%). In San Bernardino City, students with diverse learning needs represent 11% of the population. The percent is consistent with the local school district. (page e24).

## Sub Question

### Weaknesses:

When comparing the students enrolled at Fortune School of Education to their county peers, the school serves fewer English Language Learners, Hispanics (whole group), and economically disadvantaged students. The indicator varies by county. In Sacramento county, Fortune School of Education serves fewer English Language Learners (-9) and Hispanics (whole subgroup). (page e41) In San Bernardino county, Fortune School of Education serves fewer English Language Learners (-44); Hispanics (whole subgroup) (-44); and economically disadvantaged Hispanics (-31). (page e42) When compared to the neighboring public schools, both Sacramento and San Bernardino, Fortune School of Education enrolls were English Language Learners, economically disadvantaged, Hispanic and economically disadvantaged Hispanics. (page e43)

**Reader's Score:** 7

## 2. The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.

### Strengths:

The network's recruiting efforts are aligned to serving communities with higher poverty rates and a growing population. (page e45)

As documented in the application on page 47, Fortune School of Educations is committed to recruiting and enrolling educationally disadvantaged students. The network has a reasonable plan to identify students. Information overviews are the lead source of recruiting families and students. (page e48). The network will host information meetings at each of the schools. These meetings are held to assist parents in understanding the educational model. More importantly, staff from the Special Education team are available to assist parents in understand how their children's diverse educational needs will be met, if they choose to apply to and enroll at one of Future School of Education's charter schools. The network is cognizant of the need to increase enrollment and appeal to students with English Language Learning needs. To fulfill this requirement, the network employs Spanish-speakers on the enrollment team and has added additional recruiting meetings with Spanish speaking parents and families. Perspective parents and families also have an opportunity to participate in school tours. (page e47 – e48).

Marketing efforts include the traditional outreach advertising such as radio, television, newspapers. The network has strategically positioned its advertising with placements in the Sacramento Observer, which is an African American owned and operated newspaper. Further, bus advertising has been positioned to reach parents who use public transportation. The network will attempt to reach parents through social media advertising such as Facebook, Twitter, YouTube, and Twitter. Recruiting teams visit churches, canvass neighborhoods, and attend community events to discuss Future School of Educations educational model. (page e49)

### Weaknesses:

No weaknesses are noted.

**Reader's Score:** 15

## Selection Criteria - Quality of the Evaluation Plan

1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the proposed grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.

**Strengths:**

The alignment of the evaluation plan to the logical model is adequate. There are three goals by which the network will examine its long-term success. The goals include providing additional high-quality seats, advancing academic performance, and attaining sustainable growth across the network. (page e50) The logic model follows the model created by the Regional Education Laboratory (REL). Each goal is supported by resources, activities, outputs, and short; medium; and long term outcomes. The details for each of the criterion are described in the tables on page e51 & e52 of the application.

Each goal has success metrics. These performance measures include but are not limited to: % of academically disadvantaged students, average daily attendance, days missed due to suspensions, academic growth, academic achievement, number of students and schools, and high-quality surveys. (pages e51 – e52).

The network will leverage its partnership with Harvard's Strategic Data Project to aid the staff in executing against the strategies defined in the evaluation plan. The two methodologies the network will use to examine the evaluation plan are 1) Reading Response to Intervention (RtI): Regression Discontinuity and 2) Ability Groupings: Natural Experiments. Both methodologies outline practices recently implemented at the school. The initiatives focus on ELA. One program focuses on students in kindergarten to third grade, while the other centers around third to eighth grades. (pages e53 to e54).

Data dashboard and intervention repositories will be used for quantitative and qualitative analyses, if an impact evaluation cannot be conducted (page e55).

**Weaknesses:**

One of the goals outlined in the logic model is to help students attain high levels of academic achievement. (page e52). While the methodologies outlined in the application emphasize English, the proposal does not address the need to improve the network's math scores. The data presented reveal that students have only made 1% increase in math (when compared to the prior year). Similarly, when assessing students' math achievement results against the previous year, Four out of the nine subgroups experienced academic attainment decreases. As such, a methodology aligned to mathematics appears to be essential.

The network will rely on the Harvard Strategic Data Project to assist with implementation of the evaluation plan. The Strategic Data Project is a two-year program. The grant is over a five-year period. There is a concern that the evaluation plan may not be implemented with fidelity when the partnership ends.

The proposal indicates that the network will use intervention repositories to collect quantitative and qualitative data. As evidenced in the application, the network has not developed the intervention repository. (page e55).

Details regarding the network will operationalize the expansion and replication schools are included in the proposal. This information includes, but is not limited to understand the timeline for securing the facilities. While the applicant is not required funds for the facility, the grant funds the expansion and the timeline implies both schools will be opened effective fall 2017. (page e52).

**Reader's Score:**      6

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

1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—

Reader's Score: 19

Sub Question

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

**Strengths:**

The management team responsible for expanding and replicating Future School of Educations model appear to have the appropriate skills to meet the goals identified in the project proposal. The chief executive officer is the founder of the organization, and has extensive experience in the education. The director of data and analytics will be responsible for managing the project. In addition to overseeing the data for the network, the proposal indicates that the data and analytics department has been established to oversee compliance to state and federal regulations. (page e39) The chief financial officer, director of human resources, and director of curriculum and instruction will play key roles in fulfilling the objectives. The timeline documented in the application includes the task, milestones, person responsible, and timeframes. (pages e59 to e61). Background information for outlining each leader's expertise is detailed in the application as well as an appendix. (pages e66 to page e74).

**Weaknesses:**

While the table (page e60) in the proposal highlights each leader's duties, there is no clear indicator of who is responsible for meeting the desired task or milestone. In several instances, there are two or more individuals responsible for identified milestone or task. An example, the CEO and CFO oversee furnishing and outfitting the classroom. However, it is not clear who is solely responsible for completing the task. That said, there are several tasks that have multiple owners. The same challenge exists for dually held responsibilities. (pages e59 to e61).

Reader's Score: 4

**2. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and**

**Strengths:**

Since its inception, the network has grown to six charter campuses. (page e62)A review of the previous experience of the senior executive team and school principals reveal the team has adequate knowledge and skill to further expand and replicate the Future School of Education model. (page e66 to e74)

The timeline indicates that the project director will participate in the annual professional development in Washington, DC. The network will leverage it learning from previous school openings to assist with its expansion and replication. Further, their leadership team has a functioning high school team that is responsible for opening the new high school. (page e58, page e62)

The funds secured will be used purchase the equipment and furniture for the expansion and replication schools. (page e63)

**Weaknesses:**

No weakness noted.

Reader's Score: 10

## Sub Question

3. **The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model included in the applicant's response to application requirement (g).**

### Strengths:

As stated above, most of the funding for the project will be leveraged to build out the technological infrastructure (i.e., equipment and supplies) at the schools. (page e63) The network's home office will leverage its existing staff to support the replication and expansion efforts, operations, student recruiting, and professional development. (page e59) Funding from state and local sources will be used to support the school moving forward. (page e63)

### Weaknesses:

No weaknesses noted.

**Reader's Score:** 5

## Priority Questions

### Competitive Preference Priority - Promoting Diversity

1. **This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).**

**Note:** For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" ([www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).

### Strengths:

Future School of Education's focus is to close the academic achievement gap with African-American students (page e22). The network anticipates securing the grant to expand an existing campus and replicate the educational model at a new middle and high school. Through their expansion and replication efforts, network's leader project increased enrollment for English Language Learners who are educationally disadvantaged. (page e25).

Evidence presented concludes that 86% of the students enrolled at the five schools in Sacramento are African-American and Hispanic. Similarly, in San Bernardino, African-American and Hispanic students attending the Hardy Brown College Prep campus represent approximately 90% of the student population. (pages e22)

### Weaknesses:

The student population does not reflect one that intentionally recruits and retains a racially and socioeconomically diverse student body. The applicant identifies four communities/zip codes aligned to where current students reside.

In five of the eight communities, white households represent between 43% to 46% of residents in the identified areas. (pages e23 – e24). However, white students represent approximately 1% of the student population at Fortune School of Education (page e44). The recruiting strategies target diverse communities that do not appear to include white and Asian students. The network's recruiting efforts are centered around activities that are traditionally used to market to minority families such as canvassing in low-income neighborhoods, attending African-American churches/events as well as community organization meetings.

This application was thoroughly discussed with respect to each selection criterion and priority. My scores reflect my professional assessment of the application with respect to these criteria and priorities.

Reader's Score: 0

## Competitive Preference Priority - School Improvement through Turnaround Efforts

### 1. This priority is for applicants that both:

(a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and

(b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public schools during the project period, to do so by replicating a successful charter school model for which the applicant has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-performing public school at the time of restart are exempt from the charter school's lottery.

For purposes of this priority, academically poor-performing public schools may include, but are not limited to, persistently lowest-achieving schools, as defined in this notice and the final requirements for the School Improvement Grants (SIG) program under Title I of the ESEA (<https://www.federalregister.gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act>); and priority schools in States that exercised flexibility<sup>1</sup> under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department's June 7, 2012 guidance entitled, "ESEA Flexibility," at [www.ed.gov/esea/flexibility](http://www.ed.gov/esea/flexibility), and the Office of Elementary and Secondary Education's December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

Note: For applicants proposing to use CMO grant funds to replicate a high-quality charter school by restarting as a charter school one or more academically poor-performing public schools, the CMO's proposed charter school must be newly created and operating under a separate charter and governance than the academically poor-performing public school.

Footnote 1: As of August 1, 2016, States may no longer exercise flexibility, except in the limited circumstances where they implemented interventions previously in priority schools under the SIG program. For additional information related to ESEA flexibility and interventions in priority schools, see section B of the Department's June 29, 2016 guidance entitled, "Transitioning to the Every Student Succeeds Act – Frequently Asked Questions," at <http://www2.ed.gov/policy/elsec/leg/essa/essafaqtransition62916.pdf>.

#### Strengths:

The applicant did not respond to this priority.

#### Weaknesses:

The applicant did not respond to this priority.

Reader's Score: 0

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Status: Submitted  
Last Updated: 06/30/2017 03:07 PM



Status: Submitted

Last Updated: 06/29/2017 02:04 PM

## Technical Review Coversheet

Applicant: Fortune School of Education (U282M170042)

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

	Points Possible	Points Scored
<b>Questions</b>		
<b>Selection Criteria</b>		
<b>Quality of the Eligible Applicant</b>		
1. Quality of Applicant	45	33
<b>Assisting Educationally Disadvantaged Students</b>		
1. Disadvantaged Students	25	21
<b>Quality of the Evaluation Plan</b>		
1. Evaluation Plan	10	6
<b>Quality of the Management Plan and Personnel</b>		
1. Management Plan/Personnel	20	17
<b>Sub Total</b>	100	77
<b>Priority Questions</b>		
<b>Competitive Preference Priority</b>		
<b>Promoting Diversity</b>		
1. CPP 1	3	3
<b>School Improvement through Turnaround Efforts</b>		
1. CPP 2	5	0
<b>Sub Total</b>	8	3
<b>Total</b>	108	80

# Technical Review Form

Panel #3 - Charter Management Organization - 3: 84.282M

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

Applicant: Fortune School of Education (U282M170042)

## Questions

### Selection Criteria - Quality of the Eligible Applicant

1. Comments should support your recommendation according to the Selection Criteria. Please address each section and provide your scores for each section separately.

Reader's Score: 33

#### Sub Question

1. The degree to which the applicant has demonstrated success in increasing academic achievement, including graduation rates where applicable, for all students and for each of the subgroups of students described in section 1111(c)(2) of the ESEA, as amended by the ESSA, attending the charter schools the applicant operates or manages.

#### Strengths:

Information is provided that demonstrates the applicant has great success with students the longer they are enrolled in the charter school. The results compared achievement of 4th grade students on the state assessment who had attended the charter school for 5 years, to those students who have attended the school for approximately 2 years, and then the students from surrounding schools. The results strongly suggest that students enrolled in the charter schools for longer period of time have achievement gains significantly higher than those students from the district schools and those students that have attended the charter school 2 years. The 5 year groups scored anywhere from 8% - 32% higher on ELA and 2% - 24% higher on Math. Pg. e32 – e33

A comparison is made between the Latino and African American Students and their counterparts at the county level for both charter schools operated by the CMO. In each instance, the students of the CMO outperformed the county wide subgroup in both ELA and Math on the state level assessment. Pg. e27 and e35

#### Weaknesses:

The comparison of students relative to length of attendance at the charter schools indicates the two year students did not score well on the state test. These students did not score as well as any of the local district schools, with score discrepancies of -9% to -33% on ELA and -11% to -33% on math. While the applicant explains this by discussing the make-up of the student population, it still does not present a good amount of achievement after approximately 2 years of education at the charter school. Pg. e32

There is no comparison of state testing scores provided for the entire school population. The state has adopted a new testing instrument and this has only been administered since 2014-2015. It would have been helpful to provide these comparisons based just on the two years of testing data.

Reader's Score: 9

2. The extent to which the academic achievement results (including annual student performance on statewide assessments and annual student attendance and retention rates, and where applicable and available,

### Sub Question

**academic growth, high school graduation rates, college attendance rates, and college persistence rates) for educationally disadvantaged students served by the charter schools operated or managed by the applicant have exceeded the average academic achievement results for such students in the State.**

#### **Strengths:**

A comparison of test scores by subgroups for the 2015 – 2016 school year demonstrates that African American students who are educationally disadvantaged scored better than the state subgroup by 1% on the ELA test and 8% on the math test. Additionally, Latino students and Latino students that are educationally disadvantaged scored equal to or better than the state average on the ELA (by 1%) and math test (better by 7% - 12%). These two subgroups make up 81% of the student population. Pg. e35 – e36

The other measure of academic progress (Distance from Met) indicates the special education subgroup as compared to the same subgroup at the state level is equal distance from meeting the ELA target and much closer (by 14 points) to meeting the math target. Additionally, all other subgroups at the charter schools are closer to meeting the math average than their counterparts at the state level with the exception of the educationally disadvantaged subgroup. Pg. e35 – e36

#### **Weaknesses:**

The applicant does not provide information on student attendance rates or student retention rates.

The information provided on pages e35 and e36 indicate that the special education subgroup did not perform as well on the ELA or Math state tests as compared to the state. Additionally, there are no test results provided for the ELL subgroups.

**Reader's Score: 9**

- 3. The extent to which charter schools operated or managed by the applicant have not been closed; have not had a charter revoked due to noncompliance with statutory or regulatory requirements; have not had their affiliation with the applicant revoked or terminated, including through voluntary disaffiliation; have not had any significant issues in the area of financial or operational management; have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of the school's charter; and have not had any significant issues with respect to student safety.**

#### **Strengths:**

According to the narrative, there have been no compliance issues nor have any charter schools within the network been closed for noncompliance. The applicant has had no significant audit findings.

The charter schools participate in a facility inspection utilizing the California Facilities FIT tool to evaluate the safety of their schools.

#### **Weaknesses:**

None noted.

**Reader's Score: 15**

### **Selection Criteria - Assisting Educationally Disadvantaged Students**

- 1. The significance of the contribution the proposed project will make in expanding educational opportunities for educationally disadvantaged students and enabling those students to meet challenging State academic standards. In determining the significance of the contribution the proposed project will make, the Secretary**

**Reader's Score:** 21

**Sub Question**

- 1. The extent to which charter schools currently operated or managed by the applicant serve educationally disadvantaged students, including students with disabilities and English learners, at rates comparable to surrounding public schools; and**

**Strengths:**

The applicant presents information comparing the enrollment percentages of students in each subgroup. The Sacramento schools enroll percentages equal or greater than every subgroup except ELL learners. The population of these schools includes 20% higher rate of educationally disadvantaged as compared to the county and 50% higher rate of African American than the county schools. Reported percentages indicate that the charter schools in Sacramento enroll students with disabilities and Latino students at comparable rates as the county. Pg. e41

The comparison subgroup percentages at the San Bernardino charter school are close to the Sacramento charter school. The percentage of students with disabilities is the same as the county schools and African American subgroup is much larger in the charter school, 73% as compared to 8%. Pg. e42

**Weaknesses:**

The percentage of Latino students in both the charter schools in Sacramento and the charter school in San Bernardino are significantly lower than the percentage in the counties in which these charter schools are located. Sacramento charter schools have a 25% subgroup population as compared to 24% in the county and the San Bernardino charter school has 21% subgroup population as compared to 65% in the county. Pg. e41 and e42

Both sets of charter schools, Sacramento and San Bernardino, have a much lower percentage of ELL students than are in the county schools. Sacramento's population is 6% compared to 15% in the county and San Bernardino's population is 3% compared to 17% in the county. Pg. e41 and e42

**Reader's Score:** 6

- 2. The quality of the plan to ensure that the charter schools the applicant proposes to replicate or expand will recruit and enroll educationally disadvantaged students.**

**Strengths:**

The applicant is strategic in their planning of where to locate new schools. Because the applicant is committed to educating students that are educationally disadvantaged they choose locations where the poverty rate is extremely high. The student population of economically disadvantaged students is over 80%. Because new schools will be located in similar demographic areas, it is expected that the demographics will remain the same – primarily ethnic minority groups. Pg. – e44 - e45

The narrative indicates that the CMO will actively recruit educationally disadvantaged students. Through informational meetings the CMO seeks to inform all parents and caregivers about the educational options at the charter schools. Because the percentage of ELL population is much lower in the charter schools than the county schools, the applicant has created an advisory committee to help advise the CMO how best to reach the parents of these students. As a result of these meetings, the CMO has added recruitment meetings that are held in Spanish to help attract more ELL students. Pg. e44 - e45

## Sub Question

### Weaknesses:

None noted.

Reader's Score: 15

### Selection Criteria - Quality of the Evaluation Plan

1. In determining the quality of the evaluation plan for the proposed project, the Secretary considers the alignment of the evaluation plan to the logic model for the proposed grant project and the extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the proposed grant project articulated in the applicant's response to application requirement (c) and will produce quantitative and qualitative data by the end of the performance period.

### Strengths:

The applicant presents three over-arching goals for this project. The goals are aligned to the Logic model where resources, activities, outputs and outcomes are presented. Performance measures are aligned with the goals and include baseline measurements in which to compare growth towards the goals. Pg. e51 – e52

### Weaknesses:

Different approaches will be used with the student population and results will be measured for each type of approach. This presents itself as a trial and error approach with some students obviously benefitting from the process and others are losing. This does not seem to be a good method in which to determine what works best with students. Pg. e53 – e56

There is a heavy reliance on the Harvard Strategic Program. Being that this program lasts for 2 years and the grant extends for 5 years, there is concern as to what will happen to the evaluation after the first two years. While the applicant states internal people will be trained to carry on the project, there is concern as to the fidelity of the evaluation without the assistance of the outside evaluator. Pg. e53

Reader's Score: 6

### Selection Criteria - Quality of the Management Plan and Personnel

1. In determining the quality of the management plan and personnel to replicate or expand high-quality charter schools under the proposed project, the Secretary considers—

Reader's Score: 17

## Sub Question

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

### Strengths:

The management plan is outlined with timeframes and responsible parties assigned. Tasks are outlined for each major section of the management plan with milestones toward completion stated. Pg. e59 – e61

### Sub Question

The project manager has many years experience using data to make decisions that impact many individuals. He will use this expertise to ensure this project comes in on time and on budget. Pg. e68 – e69

#### **Weaknesses:**

There is a disconnect between the management plan and the logic model. The management plan does not seem to align to the logic model as some activities on the management plan are not included in the logic model. Pg. e51 – e52 and e59 –e61

**Reader's Score: 3**

- 2. The qualifications, including relevant training and experience, of the project director, chief executive officer or organization leader, and key project personnel, especially in managing projects of the size and scope of the proposed project; and**

#### **Strengths:**

The CEO/founder of the CMO is well versed in both education and educational policy having been an advisor to the governor of California on educational matters. She has been involved with promoting school reform, leading a non-profit graduate school of education that provides credentialing programs for teachers and principals that can also lead to a master's degree through University of pacific. Pg. e66 – e67

The other members of the management team are well educated and have many years of relevant experience for the tasks they are asked to perform not only for this grant project, but also for the general operating of the CMO. Pg. e 67 – e 74

The project director is well versed in research strategies and currently assists the CMO in providing data in which to guide decisions. Because the proposal involves some involved research pieces, individual will be a great asset to this process. Pg. e68 – e69

#### **Weaknesses:**

None noted.

**Reader's Score: 10**

- 3. The ability of the applicant to sustain the operation of the replicated or expanded charter schools after the grant has ended, as demonstrated by the multi-year financial and operating model included in the applicant's response to application requirement (g).**

#### **Strengths:**

The narrative states that after the grant period the charter schools will be supported by state and federal funding. Pg. e63

The supports given by the CMO to the charter schools will continue past the grant period. This includes fiscal services, operations, professional development, facilities and recruitment. Pg. 36e

## Sub Question

### Weaknesses:

The application states that the majority of expenses will be covered by public funding, but it does not give an indication as to where the other funding will come from. Pg. e63

Reader's Score: 4

## Priority Questions

### Competitive Preference Priority - Promoting Diversity

1. This priority is for projects that will provide for the replication or expansion of high-quality charter schools that have an intentional focus on recruiting and retaining racially and socioeconomically diverse student bodies (see Section 4305(b)(5)(A) of the ESEA, as amended by the ESSA).

**Note:** For information on permissible ways to meet this priority, please refer to the joint guidance issued by the Department's Office for Civil Rights and the U.S. Department of Justice entitled, "Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools" ([www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf](http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf)).

### Strengths:

The applicant currently serves a student population that is 81% and 95% economically disadvantaged, in communities that the district schools are 61% and 70% economically disadvantaged. Additionally, information provided on graphs indicates that the charter schools serve minority subgroups in a much larger percentage than do the surrounding districts. This practice will continue and the applicant will continue to work towards increasing their percentage of Hispanic students. Pg. e22-e26

Within the targeted communities, the CMO plans to intentionally focus on community organizations and community events where families from diverse backgrounds would gather, in hopes that these students would be interested in the new schools. Pg. e23 – e24

This application was thoroughly discussed with respect to each selection criterion and priority. My scores reflect my professional assessment of the application with respect to those criteria and priorities.

### Weaknesses:

This application was thoroughly discussed with respect to each selection criterion and priority. My scores reflect my professional assessment of the application with respect to those criteria and priorities.

Reader's Score: 3

### Competitive Preference Priority - School Improvement through Turnaround Efforts

1. This priority is for applicants that both:

(a) Demonstrate past success in improving the academic performance of one or more academically poor-performing public schools by taking over the operation of the school or restarting the school as a charter school; and

(b) Propose to use CMO funds to restart as a charter school one or more academically poor-performing public schools during the project period, to do so by replicating a successful charter school model for which the applicant has provided evidence of success, and to do so by targeting a similar student population in the replicated charter school as was served by the academically poor-performing public school. In accordance with section 4310(2)(B) of the ESEA, as amended by the ESSA, students who are enrolled in the academically poor-performing public school at the time of restart are exempt from the charter school's lottery.

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gov/articles/2015/02/09/2015-02570/final-requirements-school-improvement-grants-title-i-of-the-elementary-and-secondary-education-act); and priority schools in States that exercised flexibility<sup>1</sup> under the ESEA, as amended by the No Child Left Behind Act of 2001 (NCLB) (see the Department’s June 7, 2012 guidance entitled, “ESEA Flexibility,” at [www.ed.gov/esea/flexibility](http://www.ed.gov/esea/flexibility), and the Office of Elementary and Secondary Education’s December 18, 2015 Dear Colleague Letter at <https://www2.ed.gov/policy/elsec/leg/essa/transition-dcl.pdf>).

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**Strengths:**

The applicant did not respond to this priority.

**Weaknesses:**

The applicant did not respond to this priority.

**Reader's Score:**     **0**

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**Status:**             Submitted  
**Last Updated:**    06/29/2017 02:04 PM