

U.S. Department of Education
Washington, D.C. 20202-5335

APPLICATION FOR GRANTS
UNDER THE

CMO

CFDA # 84.282M

PR/Award # S282M200010

Grants.gov Tracking#: GRANT12996117

OMB No. , Expiration Date:

Closing Date: Jan 10, 2020

PR/Award # S282M200010

****Table of Contents****

Form	Page
1. Application for Federal Assistance SF-424	e3
2. Standard Budget Sheet (ED 524)	e6
3. Disclosure Of Lobbying Activities (SF-LLL)	e8
4. ED GEPA427 Form	e9
<i>Attachment - 1 (1245-GEPA Statement - 1-8-2020)</i>	e10
5. Grants.gov Lobbying Form	e11
6. Dept of Education Supplemental Information for SF-424	e12
7. ED Abstract Narrative Form	e13
<i>Attachment - 1 (1243-Fed grant abstract 2020)</i>	e14
8. Project Narrative Form	e15
<i>Attachment - 1 (1244-Fortune grant project narrative)</i>	e16
9. Other Narrative Form	e72
<i>Attachment - 1 (1234-Appendix A_Program Assurance)</i>	e73
<i>Attachment - 2 (1235-Appendix A_Program Assurance)</i>	e74
<i>Attachment - 3 (1236-Appendix B_Resumes)</i>	e75
<i>Attachment - 4 (1237-Appendix C_Letters of Support)</i>	e86
<i>Attachment - 5 (1238-Appendix D_Proof of Non-Profit Status)</i>	e89
<i>Attachment - 6 (1239-Appendix E_Schools Operated)</i>	e92
<i>Attachment - 7 (1240-Appendix F_Student Academic Achievement)</i>	e159
<i>Attachment - 8 (1241-Appendix_G Supplemental Financial Information)</i>	e189
10. Budget Narrative Form	e351
<i>Attachment - 1 (1242-Fortune School Budget Narrative)</i>	e352

This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424

* 1. Type of Submission: <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s): <input type="text"/> * Other (Specify): <input type="text"/>
--	--	--

* 3. Date Received: <input type="text" value="01/10/2020"/>	4. Applicant Identifier: <input type="text" value="Fortune Replication"/>
--	--

5a. Federal Entity Identifier: <input type="text"/>	5b. Federal Award Identifier: <input type="text"/>
--	---

State Use Only:

6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>
---	---

8. APPLICANT INFORMATION:

* a. Legal Name:

* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="██████████"/>	* c. Organizational DUNS: <input type="text" value="██████████"/>
--	--

d. Address:

* Street1:	<input type="text" value="2890 Gateway Oaks Drive"/>
Street2:	<input type="text"/>
* City:	<input type="text" value="Sacramento"/>
County/Parish:	<input type="text" value="Sacramento"/>
* State:	<input type="text" value="CA: California"/>
Province:	<input type="text"/>
* Country:	<input type="text" value="USA: UNITED STATES"/>
* Zip / Postal Code:	<input type="text" value="95833-4326"/>

e. Organizational Unit:

Department Name: <input type="text"/>	Division Name: <input type="text"/>
--	--

f. Name and contact information of person to be contacted on matters involving this application:

Prefix: <input type="text"/>	* First Name: <input type="text" value="Matt"/>
Middle Name: <input type="text"/>	
* Last Name: <input type="text" value="Taylor"/>	
Suffix: <input type="text"/>	

Title:

Organizational Affiliation:

* Telephone Number: <input type="text" value="██████████"/>	Fax Number: <input type="text"/>
---	----------------------------------

* Email:

Application for Federal Assistance SF-424

*** 9. Type of Applicant 1: Select Applicant Type:**

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

*** 10. Name of Federal Agency:**

Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.282

CFDA Title:

Charter Schools

*** 12. Funding Opportunity Number:**

ED-GRANTS-112619-001

* Title:

OESE: Expanding Opportunity Through Quality Charter Schools Program (CSP): Grants to Charter Management Organizations for the replication and Expansion of High-quality Charter Schools (CMO Grants) CFDA Number 84.282M

13. Competition Identification Number:

84-282M2020-1

Title:

CMO

14. Areas Affected by Project (Cities, Counties, States, etc.):

Add Attachment

Delete Attachment

View Attachment

*** 15. Descriptive Title of Applicant's Project:**

Replication of high performing charter schools in Sacramento, California by the Fortune School of Education.

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424

16. Congressional Districts Of:

* a. Applicant

* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

Add Attachment

Delete Attachment

View Attachment

17. Proposed Project:

* a. Start Date:

* b. End Date:

18. Estimated Funding (\$):

* a. Federal

* b. Applicant

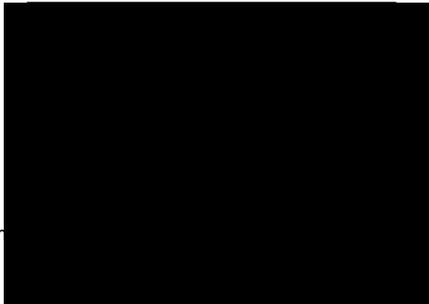
* c. State

* d. Local

* e. Other

* f. Program Income

* g. TOTAL



*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes No

If "Yes", provide explanation and attach

Add Attachment

Delete Attachment

View Attachment

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title:

* Telephone Number: Fax Number:

* Email:

* Signature of Authorized Representative: * Date Signed:

**U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS**

OMB Number: 1894-0008
Expiration Date: 08/31/2020

Name of Institution/Organization

Fortune School of Education

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY
U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel						
2. Fringe Benefits						
3. Travel	6,000.00	11,000.00	12,000.00	7,000.00	7,000.00	43,000.00
4. Equipment	289,315.00	57,532.00	321,311.00	158,930.00	233,128.00	1,060,216.00
5. Supplies	90,000.00	40,000.00	130,000.00	103,000.00	78,495.00	441,495.00
6. Contractual	92,600.00	119,940.00	82,390.00	55,836.00	57,880.00	408,646.00
7. Construction	0.00	0.00	0.00	0.00	0.00	0.00
8. Other	0.00	0.00	0.00	0.00	0.00	0.00
9. Total Direct Costs (lines 1-8)	671,977.00	428,356.00	748,337.00	533,480.00	471,731.00	2,853,881.00
10. Indirect Costs*	34,405.00	21,932.00	38,315.00	27,314.00	24,153.00	146,119.00
11. Training Stipends	0.00	0.00	0.00	0.00	0.00	0.00
12. Total Costs (lines 9-11)	706,382.00	450,288.00	786,652.00	560,794.00	495,884.00	3,000,000.00

***Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? Yes No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: To: (mm/dd/yyyy)

Approving Federal agency: ED Other (please specify):

The Indirect Cost Rate is %.

(3) If this is your first Federal grant, and you do not have an approved indirect cost rate agreement, are not a State, Local government or Indian Tribe, and are not funded under a training rate program or a restricted rate program, do you want to use the de minimis rate of 10% of MTDC? Yes No If yes, you must comply with the requirements of 2 CFR § 200.414(f).

(4) If you do not have an approved indirect cost rate agreement, do you want to use the temporary rate of 10% of budgeted salaries and wages?
 Yes No If yes, you must submit a proposed indirect cost rate agreement within 90 days after the date your grant is awarded, as required by 34 CFR § 75.560.

(5) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? Or, Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is %.
PR/Award # S282M200010

Name of Institution/Organization Fortune School of Education	Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.	
---	---	--

**SECTION B - BUDGET SUMMARY
NON-FEDERAL FUNDS**

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel						
2. Fringe Benefits						
3. Travel						
4. Equipment						
5. Supplies						
6. Contractual						
7. Construction						
8. Other						
9. Total Direct Costs (lines 1-8)						
10. Indirect Costs						
11. Training Stipends						
12. Total Costs (lines 9-11)						

SECTION C - BUDGET NARRATIVE (see instructions)

ED 524

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

OMB Number: 4040-0013
Expiration Date: 02/28/2022

1. * Type of Federal Action: <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
--	--	--

4. Name and Address of Reporting Entity:

Prime SubAwardee

* Name: Fortune School of Education

* Street 1: 2890 Gateway Oaks Drive Street 2: _____

* City: Sacramento State: CA: California Zip: 95833

Congressional District, if known: _____

5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:

6. * Federal Department/Agency: Department of Education	7. * Federal Program Name/Description: Charter Schools
	CFDA Number, if applicable: 84.282

8. Federal Action Number, if known: _____	9. Award Amount, if known: \$ _____
---	---

10. a. Name and Address of Lobbying Registrant:

Prefix _____ * First Name N/A Middle Name _____

* Last Name N/A Suffix _____

* Street 1 N/A Street 2 _____

* City N/A State _____ Zip _____

b. Individual Performing Services (including address if different from No. 10a)

Prefix _____ * First Name N/A Middle Name _____

* Last Name N/A Suffix _____

* Street 1 N/A Street 2 _____

* City N/A State _____ Zip _____

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* Signature: Matt Taylor

* Name: Prefix _____ * First Name Bonnie Middle Name _____
* Last Name Bensen Suffix _____

Title: Chief Financial Officer Telephone No.: _____ Date: 01/10/2020

Federal Use Only: _____ Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)

NOTICE TO ALL APPLICANTS

OMB Number: 1894-0005
Expiration Date: 04/30/2020

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may

be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

(1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.

(2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.

(3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

(4) An applicant that proposes a project to increase school safety might describe the special efforts it will take to address concern of lesbian, gay, bisexual, and transgender students, and efforts to reach out to and involve the families of LGBT students.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1894-0005.

Optional - You may attach 1 file to this page.

1245-GEPA Statement - 1-8-2020.pdf

Add Attachment

Delete Attachment

View Attachment



FORTUNE STATEMENT RE: SECTION 427 of GEPA

Assurances for Students

Fortune Schools will be open to any students wishing to attend the schools, subject only to enrollment capacity. The charter school will be non-sectarian in its programs, admission policies, and all other operations and will not charge tuition. Except in the cases of a public random drawing due to over-capacity, admission to the charter school shall not be determined according to the place of resident of the pupil, or his or her parent or guardian, within the state. No test or assessment shall be administered prior to acceptance and enrollment to the school. The charter school will comply with all laws establishing a minimum and maximum age for public school attendance in charter schools

While Fortune Schools target students from economically disadvantaged backgrounds, admission is open to any resident of California. Students will be considered for admission without regard to the characteristics listed in Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code or association with any individual who has any of the aforementioned characteristics). Fortune School does not have a selective admissions policy: all students who apply are eligible. Complete registration will include proof of immunization, proof of meeting minimum and maximum age requirements, and an enrollment application. No test, interview, or assessment is required as part of the application process.

Assurances for Employees

Fortune Schools provide equal opportunity for all qualified applicants and staff. Employment decisions are based on qualifications, abilities and work performance. Fortune Schools does not discriminate against any applicant on the basis of his/her race, color, religion, sex (including pregnancy, childbirth of related medical conditions), national origin, ancestry, age, physical or mental disability, legally protected medical conditions, family care status, veteran status, marital status, sexual orientation, gender, gender identity, gender expression or any other basis protected by federal, state or local laws or prohibited by Education Code Section 220.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION <input style="width: 90%;" type="text" value="Fortune School of Education"/>	
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Prefix: <input style="width: 100px;" type="text"/>	* First Name: <input style="width: 200px;" type="text" value="Matt"/> Middle Name: <input style="width: 150px;" type="text"/>
* Last Name: <input style="width: 300px;" type="text" value="Taylor"/>	Suffix: <input style="width: 80px;" type="text"/>
* Title: <input style="width: 250px;" type="text" value="Director, Data, Analytics and Strategy"/>	
* SIGNATURE: <input style="width: 300px;" type="text" value="Matt Taylor"/>	* DATE: <input style="width: 150px;" type="text" value="01/10/2020"/>

**U.S. DEPARTMENT OF EDUCATION
SUPPLEMENTAL INFORMATION
FOR THE SF-424**

1. Project Director:

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
	Matt		Taylor	

Address:

Street1:	2890 Gateway Oaks Drive
Street2:	
City:	Sacramento
County:	CA
State:	CA: California
Zip Code:	958333509
Country:	USA: UNITED STATES

Phone Number (give area code)	Fax Number (give area code)

Email Address:

--

2. Novice Applicant:

Are you a novice applicant as defined in the regulations in 34 CFR 75.225 (and included in the definitions page in the attached instructions)?

Yes No Not applicable to this program

3. Human Subjects Research:

a. Are any research activities involving human subjects planned at any time during the proposed Project Period?

Yes No

b. Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #: 1 2 3 4 5 6

No Provide Assurance #, if available:

--

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

	Add Attachment	Delete Attachment	View Attachment
--	----------------	-------------------	-----------------

Abstract

The abstract narrative must not exceed one page and should use language that will be understood by a range of audiences. For all projects, include the project title (if applicable), goals, expected outcomes and contributions for research, policy, practice, etc. Include population to be served, as appropriate. For research applications, also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that this investigation builds upon and that provides a compelling rationale for this study)
- Research issues, hypotheses and questions being addressed
- Study design including a brief description of the sample including sample size, methods, principals dependent, independent, and control variables, and the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

* Attachment:



Applicant: Fortune School of Education

Project Director: Matt Taylor, Director, Data, Analytics and Strategy; [REDACTED]

Competitive Preference Priorities Addressed: 1—Spurring Investment in Qualified Opportunity Zones; 2—Number of Charter Schools Operated or Managed

Absolute Priority: Fortune School of Education (FSE) serves a Low-Income Demographic

Goals: 1) Serve and retain academically disadvantaged students. 2) Help students attain high levels of Academic Achievement. 3) Sustainably grow the *Fortune Model*.

Proposed Project Outcomes:

Performance Measure	Baseline	20-21	21-22	22-23	23-24	24-25
% economically disadvantaged	79%	80%	80%	80%	80%	80%
% Met in ELA / Math	47% / 47%	50% / 50%	53% / 53%	56% / 56%	59% / 59%	62% / 62%
# of Students / Sites	1856 / 7	2100 / 8	2250 / 8	2450 / 9	2700 / 9	2900 / 9

Number of Participants to be Served: 670 additional students at two sites

Locations of Proposed Sites: One site will open in Fall of 2020 and be located at 2801 Meadowview Rd, Sacramento, CA 95832. The other site will open fall 2022, and its location has yet to be determined.

Background:

Fortune School of Education (FSE) provides a regional solution to a regional problem. FSE is increasing the availability of rigorous, college preparatory, public school programs to students throughout Sacramento and San Bernardino counties with the goal of closing the African American achievement gap. From 2014-15 to 2018-19 FSE grew from 1,281 to 1,856 students, from 30% to 47% Met in ELA, and from 20% to 47% Met in Math. We also expanded into high school, offering our scholars an early college model where they can graduate high school and earn an Associate's Degree simultaneously.

Project Narrative File(s)

* **Mandatory Project Narrative File Filename:**

[Add Mandatory Project Narrative File](#)

[Delete Mandatory Project Narrative File](#)

[View Mandatory Project Narrative File](#)

To add more Project Narrative File attachments, please use the attachment buttons below.

[Add Optional Project Narrative File](#)

[Delete Optional Project Narrative File](#)

[View Optional Project Narrative File](#)



Fortune School Replication

Project Narrative for
Replication of Two High Quality
Charter Schools in Sacramento,
California

CFDA 84.282M

Table of Contents

Absolute Priority – Low-Income Demographic	2
Competitive Preference Priorities	4
Competitive Preference Priority 1 - Spurring Investment in Qualified Opportunity Zones	4
Competitive Preference Priority 2 – Number of Charter Schools Operated or Managed .	4
Selection Criteria A: Quality of the eligible applicant and adequacy of resources	6
Selection Criteria A1:	6
Fortune demonstrates exceptional academic achievement and growth for educationally disadvantaged students	6
Selection Criteria A2:	12
No charters have separated from our central office	12
Selection Criteria A3:	12
Fortune has no significant financial or compliance issues	12
Selection Criteria A4:	14
Fortune maintains strong financial support and sustainability after the grant period ...	14
Selection Criteria B: Assisting Educationally Disadvantaged Students	15
Selection Criteria B1:	15
Fortune’s mission is to serve Educationally Disadvantaged Students	15
Selection Criteria B2:	26
Fortune Recruits and Enrolls a high percentage of Educationally Disadvantaged Students	26
Selection Criteria C: Quality of the Project Design and Evaluation Plan	35
Selection Criteria C1: Conceptual framework	35
Selection Criteria C2: Logic model	37
Selection Criteria C3: Clear and measurable goals	42
Selection Criteria C4: Learning for future replications	43
Selection Criteria D: Quality of the project personnel and management plan	46
Selection Criteria D1: Qualifications of Key Personnel	46
Selection Criteria D2: Procedures for feedback and continuous improvement	50

Absolute Priority –

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 two schools in California: one located in the Greater Sacramento Area (Fortune School), and one in San Bernardino (Hardy Brown College Prep). Combined, they served a total of 1856 students on Census Day 2019-20. **Almost 79% (1460) of those students live under the national poverty level and qualify for Free and Reduced Priced Meals (FRPM) under the federal School Nutrition Program (SNP)** (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 - with student groups who are normally educationally disadvantaged. In addition, the high-quality work Fortune School of Education is doing is very much supported by other organizations, including a strong support from other organizations, including the Charter School Growth Fund. Fortune has been honored to be invited as the most recent school system to join the Charter Schools Growth Fund's National Portfolio – their most selective group of CMOs. (See Appendix C for letters of support).

In our Sacramento charter, 77% of current students come from economically disadvantaged communities and households. In comparison, Sacramento County serves only 61% economically disadvantaged students. **In San Bernardino, FSE**

serves 86% students who come from economically disadvantaged households, in comparison to the 72% of economically disadvantaged students being served within San Bernardino County.

The CSP Replication and Expansion Grant will support FSE's mission to serve more students. FSE will replicate its model of rigor and college prep by opening two new sites in the Greater Sacramento area. 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.

Note: The project proposes to address absolute priority 2.

Competitive Preference Priorities

Competitive Preference Priority 1 –

Spurring Investment in Qualified Opportunity Zones

One of our new sites, Tecoy Porter College Prep (TPCP), will be located in a Qualified Opportunity Zone. Its address (2801 Meadowview Rd, Sacramento, CA 95832) will place it in the Sacramento Census Tract FIPS 06067004203. There are seven other qualifying census tracts within a 3-mile radius, and eight more that are a little further away but still within the southern Sacramento area. We expect 51-75% of scholars attending this site will live in a qualified census tract.

We have not yet finalized the location for the second new site in Sacramento. Fortune always target areas with a concentration of low income African American students. We currently operate six sites in Sacramento: two of them are in Qualified Opportunity Zones, and another two are located across the street from such a zone. Therefore, we anticipate at least 25-50% of the scholars who attend this second new site to live in a qualifying census tract.

Altogether, we anticipate that 51-75% of the new scholars and families we will serve at our two new sites will live within a Qualified Opportunity Zone.

Competitive Preference Priority 2 – Number of Charter Schools Operated or Managed

Fortune School of Education operates two charter schools, one in Sacramento and one in San Bernardino. Each school has a charter that needs periodic renewal by its own

authorizer, and each school is held accountable to both federal and state accountability requirements.

The Sacramento school is a “county-wide benefit charter,” which means that one school serves students at multiple locations within Sacramento County¹. While we give each Sacramento location its own name, the sites are all part of one school. The authorizer for that school is Sacramento County Office of Education, and it decides whether or not to renew that one school, not each individual site. Additionally, the California Department of Education only reports data on the entire Sacramento school, not each site. More detail about the names, locations and information about the schools operated by Fortune can be found in Appendix E.

Note: This project does not propose to conduct the activities associated with competitive preference priorities 3 through 5.

¹ Fortune School has one County District Code (CDS) for all seven locations in the Sacramento area including: Fortune School (K-5), William Lee College Prep (K-5), Ephraim Williams College Prep (6-8), Alan Rowe College Prep (TK-5) Fortune Middle School (6-8), Hazel Mahone College Prep (TK-6), and Rex and Margaret Fortune Early College High School (9-11).

Selection Criteria A:

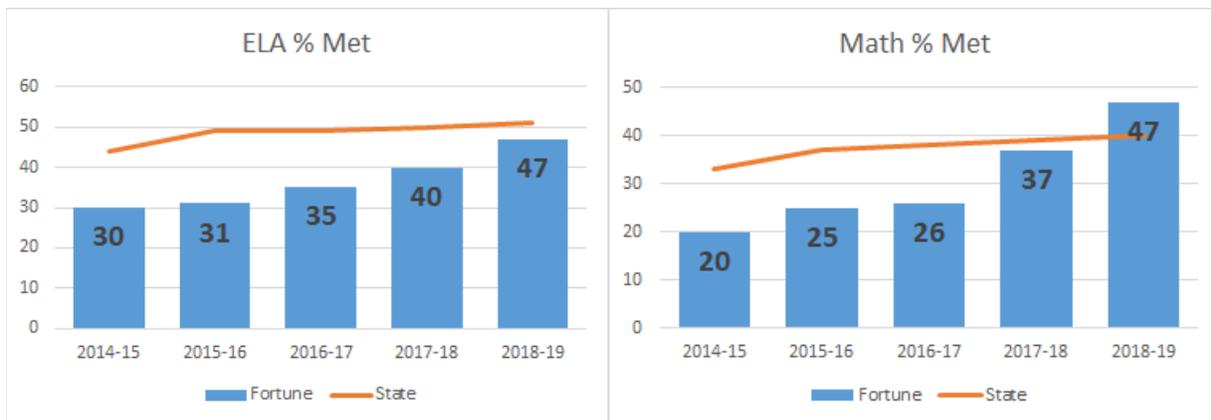
Quality of the eligible applicant and adequacy of resources

Selection Criteria A1:

Fortune demonstrates exceptional academic achievement and growth for educationally disadvantaged students

Fortune School of Education has experienced tremendous academic growth over the past five years, 2014-15 to 2018-19. While California had 7% more students meeting standards in ELA and Math, we had 17% more students meeting standards in ELA and 27% more students meeting standards in Math. Our Math achievement is now higher than the statewide average (47% vs. 40% meeting standards), and our ELA achievement is almost as high (47% vs. 51% meeting standards).

Figures 1 and 2: Five Years of Academic Performance



When we look at achievement levels and growth for educationally disadvantaged students, our results are even more impressive. With the exception of Students with Disabilities, we outperform the state - often by double digits - for all subgroups in both achievement and growth.

Table 1: ELA % Met²

Educationally Disadvantaged Groups	Achievement in 2019		Growth from 2015 to 2019	
	FSE	California	FSE	California
English Learners	18	13	18	2
Students with Disabilities	11	16	1	4
Economically Disadvantaged	47	39	17	8
African American	44	33	19	5
Economically Disadvantaged African American	44	27	19	5
Latino	55	41	14	9
Economically Disadvantaged Latino	54	36	14	8

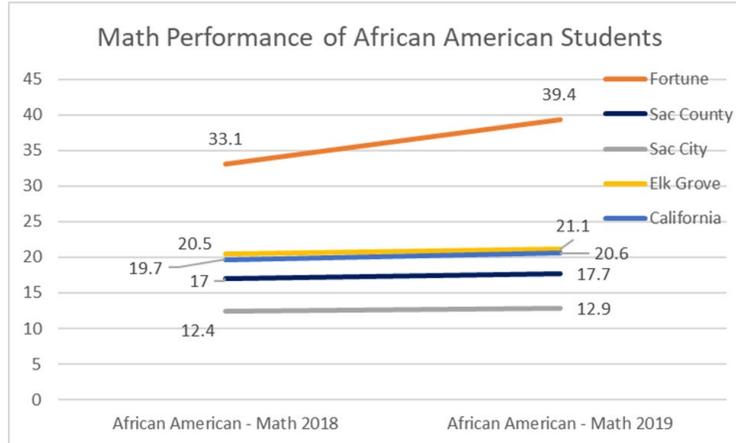
Table 2: Math % Met

Educationally Disadvantaged Groups	Achievement in 2019		Growth from 2015 to 2019	
	FSE	California	FSE	California
English Learners	33	13	33	2
Students with Disabilities	13	13	6	4
Economically Disadvantaged	46	27	23	6
African American	41	21	21	5
Economically Disadvantaged African American	40	16	20	3
Latino	57	28	30	7
Economically Disadvantaged Latino	57	25	29	8

African American and Latino students make up approximately 90% of Fortune’s enrollment. Fortune’s Math performance for African American students is far above the districts our students would otherwise attend. Not only is the absolute performance higher, but Fortune is growing at a faster rate, thus closing achievement gaps. For a detailed analysis of these same test results by grade level, please see appendix F.

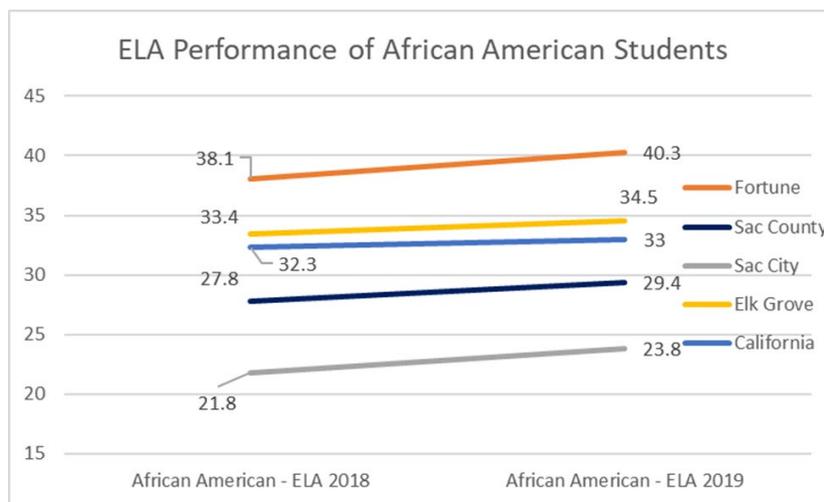
² Tables 1 and 2 include data for each of the significant subgroups served by Fortune.

Figure 3: Math Performance of African American Students



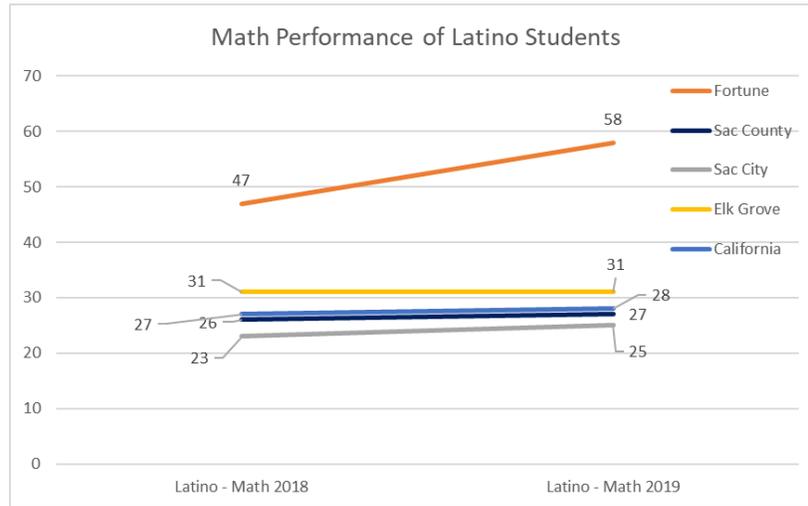
We observe the same pattern for African American students in ELA where Fortune students are far above the districts our students would otherwise attend. Again, not only is the absolute performance higher, but Fortune is growing at a faster rate, thus closing achievement gaps.

Figure 4: ELA Performance of African American Students



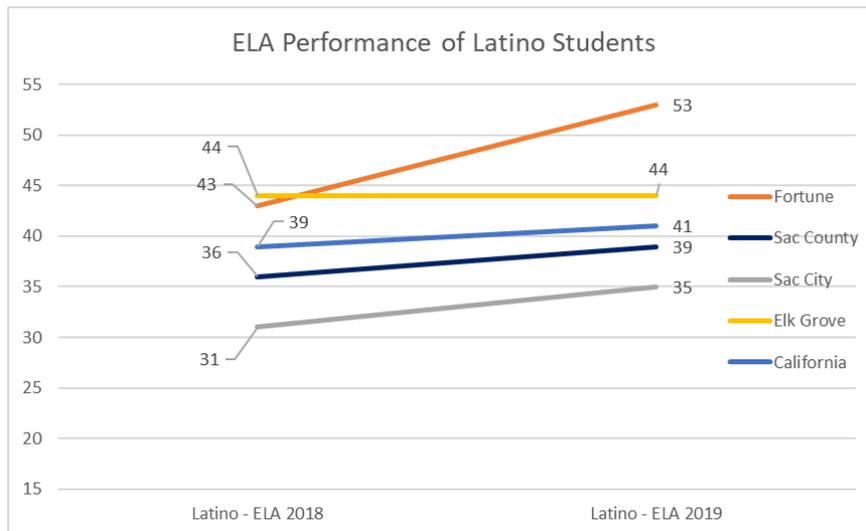
Not only is Fortune closing gaps with African American students, Fortune's Math performance for Latino students is also far above the districts our students would otherwise attend. Not only is the absolute performance higher, but Fortune is growing at a faster rate, thus closing achievement gaps.

Figure 5: Math Performance of Latino Students



We observe the same pattern for Latino students in ELA where Fortune students are far above the districts our students would otherwise attend. Again, not only is the absolute performance higher, but Fortune is growing at a faster rate, thus closing achievement gaps.

Figure 6: ELA Performance of Latino Students



In addition to comparing results to local school districts and the state using percent of students who have met state standards, Fortune also calculates a similar schools metric

to compare our performance to that of other schools that look similar on their demographics. The table below shows a state rank – a rank of all schools in the state broken down into deciles. This chart tells us that on a state rank 5 of the 6 schools we operate are in the top half of all schools in the state in absolute performance. Even more exciting, the similar schools ran compares our schools performance to similar schools and groups schools into deciles. 100 percent of the schools we operate are in the top 30% of similar schools statewide and 5 of the 6 are in the top 10% of similar schools statewide.

Table 3: State Ranks and Similar Schools Ranks

	State Rank 2018	State Rank 2019	Similar Schools Rank 2018	Similar Schools Rank 2019
ARCP	4	6	4	8
EWCP	2	4	8	10
FS	8	8	10	10
HBCP	6	7	9	10
HMCP	5	6	7	10
WLCP	4	6	6	10

As an organization that embraces continuous improvement, we use these indicators to help us identify other schools who are having success serving a similar demographic of students and try and learn from those schools. For more detail regarding the methodology used to calculate these results, please see Appendix F.

Table 4 below shows that Fortune School of Education has better (lower) chronic absence rates for English Learners and Latino students than the state. However, FSE’s rates for African American students are slightly higher than the state: 23% vs. 21%. Most of FSE’s students with disabilities and economically disadvantaged students are

also African American, which explains why our chronic absence rates for those two groups are also higher than the state. We are making efforts to reduce our chronic absence rates, including both positive incentives (e.g. prizes) and negative incentives (e.g. meetings with families whose scholars have many unexcused absences).

Table 4: Chronic Absence Rates in 2018-19

Educationally Disadvantaged Groups	FSE	California
English Learners	5.3	9.9
Students with Disabilities	24.1	16.3
Economically Disadvantaged	21.3	11.0
African American	23.1	20.6
Latino	11.1	12.9

California does not report attendance or retention data by school and group. Those are not metrics included in the state accountability system. Therefore, we can report the data for our schools but we cannot find comparable data for the state. Our attendance rate for 2018-19 was 96% for English Learners, 95% for Latino students, and 94% for students with disabilities, economically disadvantaged students, and African American students. Our retention rates for 2018-19 were 100% for students with disabilities, 93% for English Learners, 91% for Latino students, 88% for economically disadvantaged students, and 87% for African American students.

We do not yet have measures of high school success: graduation rate, college attendance rates, and persistence rates. That is because our early college high school opened with only freshmen in 2017-18. Our first cohort will be seniors in 2019-20. However, all our high school students are scheduled to take college courses starting their freshman year, and the goal is that in four years' students will graduate from high school while simultaneously earning their Associate's Degree.

Selection Criteria A2:

No charters have separated from our central office

Fortune School of Education has only ever operated two charters Fortune (Sacramento) and Hardy Brown College Prep, and neither has ever separated from our central office. These charters have each been renewed by their local authorizer. No charter school operated or managed by FSE has ever closed. No charter has been revoked due to academic, fiscal mismanagement or noncompliance reasons. No charter has had their affiliation with FSE revoked or terminated, including through voluntary disaffiliation

Selection Criteria A3:

Fortune has no significant financial or compliance issues

We have not had any significant issues in the area of financial or operational management. We have not experienced significant problems with statutory or regulatory compliance that could lead to revocation of a school's charter. Lastly, we have 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 (See Financial Audits in Appendix G). To ensure accountability FSE also develops a three-year Local Control and Accountability Plan

(LCAP), which is the organization's strategic plan. The LCAP is required by state law and is transmitted to our charter authorizers annually.

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 plan; and Local Control and Accountability Plan Stakeholder meetings, where parents, staff and faculty can give input on how well FSE 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 Council and English Learner Advisory committee. 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, we always maintain a straight and open line of communication with the individuals responsible for the fiscal, curriculum and operational components of the organization.

Policies to relocate students if a charter closes

Appendix E contains the full text of our closure procedures as stated in our charter petitions. In short, the Fortune School of Education Board would take action as swiftly as possible to help our scholars transition to the best available schools as smoothly as possible. We would notify parents and nearby districts of the closure and provide them with all relevant student information. We would tell parents about the academic performance of all nearby schools - traditional and charter - so that they can make informed choices about where to send their children next.

Selection Criteria A4:

Fortune maintains strong financial support and sustainability after the grant period

Our Chief Financial Officer takes a very conservative approach to budget management. We always maintain healthy reserves. Beyond the grant, FSE will continue to be operated locally, with the majority of operating expenses covered by state and federal funding. Please see Appendix G for detailed financial information for the past four fiscal years. We take actions to scale back expenses mid-year if projected expenses significantly exceed expectations. We only add ongoing expenses (e.g. personnel) if we are able to pay for those expenses with normal funding sources. Any grants or other special revenues we receive are helpful to cover one-time or short-term expenses associated with expansion. For example, it is expensive to pay for a principal at a new site when the site's enrollment is only partially built out. But we always plan to have self-sustaining budgets once sites are operating near capacity. The financial statements show that Fortune is an organization that maintains a healthy fiscal reserve

for times of uncertainty and has built a program that is sustainable on state and federal revenues once the schools are fully built out. Additionally, FSE is now a part of the National Portfolio of the Charter School Growth Fund (CSGF). That means the CSGF will provide advice and financial support to ensure that we continuously improve how we serve our students. The CSGF has provided a letter of support for this expansion grant (see Appendix C).

Selection Criteria B:

Assisting Educationally Disadvantaged Students

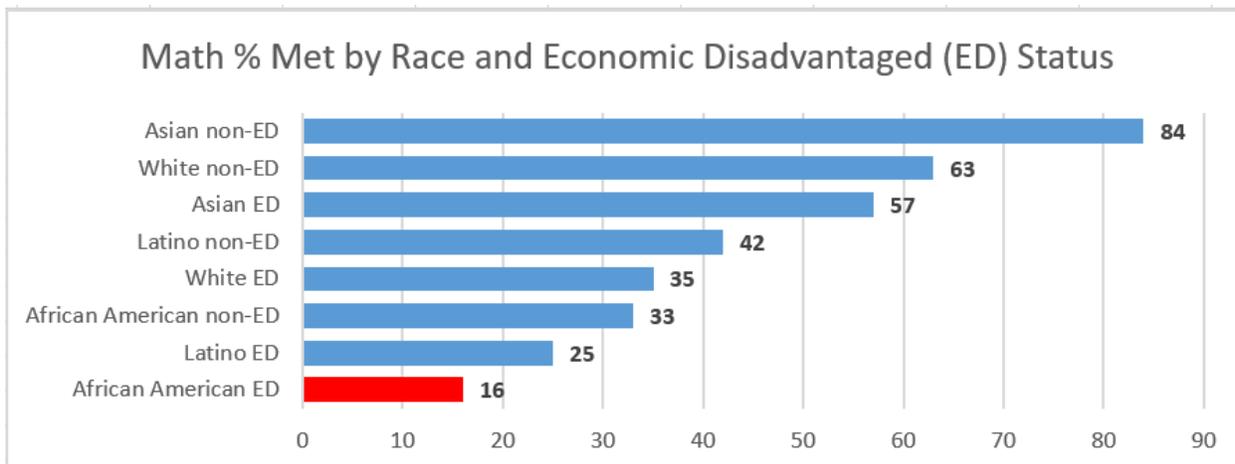
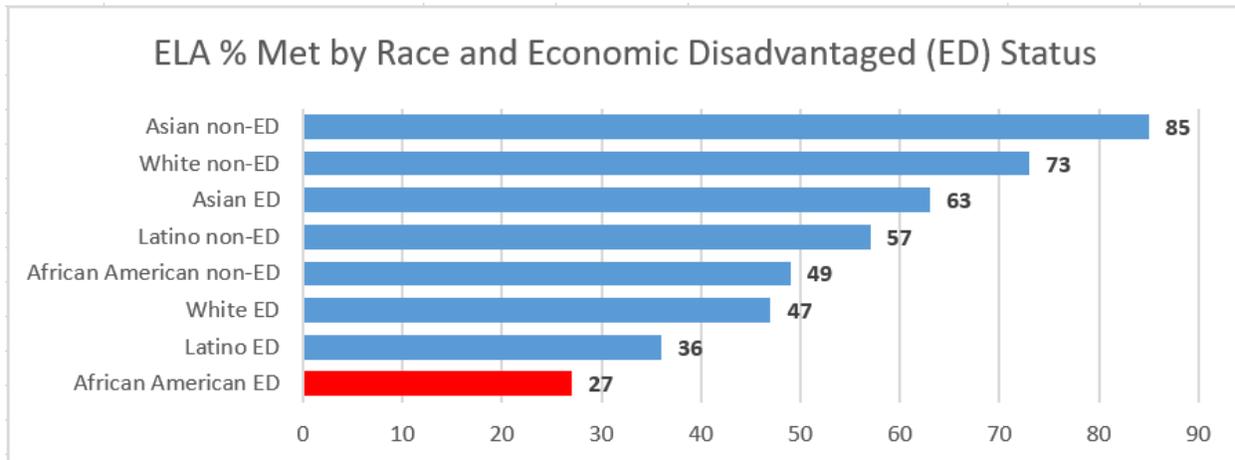
Selection Criteria B1:

Fortune’s mission is to serve Educationally Disadvantaged Students

In 2018-19, 84% of FSE’s students were educationally disadvantaged in some way: economically disadvantaged, English Learners, and/or students with disabilities. The figures below display statewide achievement data for each racial subgroup divided into its economic disadvantaged components (i.e. ED or non-ED). Economically disadvantaged African-American students are the lowest performing in both subjects. This subgroup is only 4% of statewide enrollment and approximately 10% of enrollment in Sacramento and San Bernardino Counties. In contrast, over half of who we serve at Fortune School of Education are economically disadvantaged African American students. In the figures below we see that 27 percent of low income African American students in California meet state standards in ELA, while at Fortune 44% of these same students meet state standards. Similarly, in Math, 16 percent of low income African American students in California meet state standards in Math, while at Fortune

40% of these same students meet state standards. Similar comparisons for all educationally disadvantaged subgroups are found in section A1 of this proposal.

Figures 7 and 8: Statewide Subgroup Performance



The graph below shows the demographics of test-takers for our two charters and the counties in which they operate. The pattern is similar for both comparisons. In both counties, we serve approximately a **20% higher percentage of economically disadvantaged students**. We serve a lower percentage of students with disabilities, especially at Hardy Brown College Prep. This rate has decreased; back in 2014-15, 9% of the students we served in San Bernardino had disabilities. We plan to make a concerted effort to recruit and retain students with disabilities.

Table 5: Demographic Comparisons

Subgroup	Fortune	Sacramento County	Hardy Brown	San Bernardino County
Economically Disadvantaged	82%	61%	91%	72%
Students with Disabilities	8%	12%	3%	12%
English Learners	8%	17%	6%	16%
African American	65%	11%	66%	8%

We also serve a lower percentage of English Learners. This reflects the fact that nearly two-thirds of our scholars are African American, far higher than Sacramento County (11%) or San Bernardino County (8%). Statewide, less than 2% of African Americans are English Learners while 29% of Latino students are English Learners. We will continue to make an effort to recruit English Learners, including by hiring Spanish-speaking staff for recruitment and enrollment. However, any majority African American school is likely to have a somewhat smaller share of English Learners given the realities of that demographic group in California.

Fortune Meets the Educational Needs of Educationally Disadvantaged Students

As a highly integrated charter management organization that is committed to our Fortune model, all schools, including the two new school proposed in this project, follow the Fortune mission, policies, procedures and curriculum with fidelity. These new schools will look very similar to our existing high-performing schools.

Mission of Fortune

To graduate high achieving students of good character prepared for college and citizenship in a democratic society.

Education Philosophy of Fortune

An Educated Person in the 21st Century

Being an educated person in the 21st Century means to have a high level of academic mastery as well as critical thinking and problem-solving skills that will provide opportunities and preparation for college and career. Fortune School seeks to promote students with the highest levels of academic achievement and character. These academic and life skills will give students the tools to meet the educational, professional and personal challenges of the 21st century.

How Learning Best Occurs

Fortune School adheres to the Five Pillars originally developed by KIPP (Knowledge Is Power Program). The Five Pillars guide the operation of Fortune School and serve as the values by which administrators, faculty and staff serve and interact with scholars. The Five Pillars are the framework for the innovative program design that distinguishes Fortune School from other schools in the region.

Fortune School Five Pillars

1. **High Expectations** – We have high expectations for academic achievement and conduct that are clearly designed, measurable and make no excuses based on the background of the students. Students, parents, teachers and staff create and reinforce a culture of achievement and support.
2. **Choice and Commitment** – Students, their parents and staff choose to participate in the program. Everyone must make and uphold a commitment to the school and to each other to put in the time and effort required for success.

3. **More Time** – We know that there are no shortcuts when it comes to success in academics and life. With an extended school day, week and year; students, teachers, school leaders, parents and staff dedicate more time. This ensures that students acquire the knowledge and skills that prepare them for competitive colleges, as well as opportunities to engage in diverse extracurricular activities.

4. **Focus on Results** – We focus relentlessly on high student performance through standardized tests and other objective measures. Just as there are no shortcuts, there are no exceptions. Students are expected to achieve a level of academic performance that will enable them to succeed in the nation’s best colleges and the world beyond.

5. **Citizenship** - We strongly believe that the measure of a person’s success is in what he or she gives to others. Through community service, students develop a strong sense of civic responsibility and establish the foundation for a lifetime of meaningful community involvement. Students also deepen and demonstrate their learning and are empowered to become productive citizens in the community in which they live.

Framework for Instructional Design

As explained above, Fortune School believes in the Five Pillars. These values are reflected in the design of our instructional program.

Fortune School delivers all of its educational services through site-based programs. Our approach is to implement standards-aligned instructional materials that is tightly aligned at each campus. We consider following our instructional materials in a disciplined fashion a part of our commitment to High Expectations (Pillar #1). Our overall goal is to prepare each of our scholars to be competitively eligible for a four-year college or university.

The California State Board of Education has adopted or is in the process of adopting new standards for the core disciplines (English/Language Arts, Mathematics, Humanities, and Science.) Fortune School will ensure that scholars demonstrate mastery of these standards, including the Common Core State Standards for Math and ELA and the *Next Generation Science Standards for California Public Schools, Kindergarten through Grade 12*. Fortune teachers clearly articulate and post the standards in each classroom and integrate the standards into all lesson plans and classroom activities.

As the California State Board of Education has shifted from the previous set of content standards to the Common Core State Standards (CCSS), Fortune School has been proactive in making the same shift. To do this, Fortune, adopted new curriculum materials from:

- Achievement First's Accelerate Math Lessons for Grades K-8.
- EL Education's ELA Curriculum for Grades K-1.
- Benchmark Advance ELA Curriculum for TK.
- HMH Journey's ELA Curriculum for grades 2-4. This has been modified with the support of Achievement Partners and Achievement First.
- Curriculum Associates iReady Reading and Writing for grades 2-4.
- Achievement First's Accelerate Literature Lessons for grades 5-8.

Fortune also adopted Chromebooks for the implementation of blended learning and assessments and provides ongoing outreach to parents to increase understanding of the Common Core State Standards and the Smarter Balanced Assessment Consortium (SBAC) Assessment of ELA and Math.

Fortune has also addressed the shift to the California Adopted Common Core State Standards by providing teachers with ongoing, intensive professional development and extended planning time to implement the use of the new curriculum, Chromebooks, and instructional strategies aligned to the Common Core State Standards.

Table 6: Core Instructional Materials for K-12

Subject	Curriculum
English Language Arts/English Language Development	<ul style="list-style-type: none"> • TK: Benchmark Advance • K-1: EL Education • 2-4: HMH Journeys + Curriculum Associates iReady Reading and Writing Lessons. • 5-8: Achievement First Accelerate Literature & Writing Lessons. • 9-11: Teacher developed using open source materials.
Mathematics	<ul style="list-style-type: none"> • K-8: Achievement First Accelerate Math Lessons • 9-11: Teacher developed in collaboration with Cal Poly San Luis Obispo.
Science	<ul style="list-style-type: none"> • K-1: Embedded in EL Curriculum • 2-5: Foss Kits • 6-8: Lab-Aids with supplements from Cal Poly San Luis Obispo & Apple's <i>Everyone Can Code</i> • 9-11: Teacher developed in collaboration with Cal Poly San Luis Obispo
Humanities	Embedded in ELA Curriculum

One of the major focuses Fortune has whenever curriculum is adopted and implemented is to ensure that the curriculum serves educationally disadvantaged students well, particularly how well these curricular resources address the needs of these students as well as students with disabilities and English learner students. During

Fortune's evaluation of this curriculum, we found that both the EL Curriculum and the Accelerate curriculum were exceptional in providing access to all students, including students with disabilities and English learners. In our first several years with these curricula, we have seen that we have been closing achievement gaps with educationally disadvantaged groups.

Teacher Professional Development

Fortune provides 54 days of professional development (weekly intellectual preparation, workshops, and conferences) to teachers. School sites have weekly staff development meetings, daily planning time, and a weekly early release day. The focus of Fortune's professional development is on Setting the Tone for Learning (Classroom Management), Intellectual Preparation for its Common Core aligned/state-adopted instructional materials, data-driven instruction, ratio strategies for student-centered classrooms, Close Reading strategies in ELA, and explicit training in the planning and execution of its Math Curriculum. A highlight of Fortune's professional development offerings is its Summer Symposium. This is a multi-day event for all staff focusing on Fortune culture and organization-wide initiatives.

In addition to its in-house professional development, Fortune participates in national, cohort-based programs designed for the top emerging charter management organizations in America. Fortune is a member of the Charter School Growth Fund Emerging CMOs Program and the Charter Network Accelerator hosted by Achievement First, one of the top performing CMOs in the country. Fortune's Senior Data Analyst and Director of Data, Analytics and Strategy have recently completed an exclusive program with Harvard School of Education called the Strategic Data Partnership. Since 2008, the

Strategic Data Partnership has been partnering with school districts, charter schools, and state departments of education to bring high-quality research methods and data analytics strategies to bear on educational decision making. This partnership has sharpened the skills of our data team and connected Fortune with high-quality organization from all over the country. Fortune's Director of Data, Analytics and Strategy completed a two-year fellowship program with the Broad Residency for Urban Education. This is a leadership development program where leaders from approximately 40 urban school districts or charter management organizations research and learn about best practices in Urban Education from leading practitioners in the field and travel to cities around the country to see the best practices in action.

Fortune has invested heavily in training Principals and Master Teachers through the RELAY Graduate School of Education. Fortune's Director of Curriculum & Instruction, as well as principals from three schools, completed the RELAY Graduate School of Education's National Principal Supervisor Academy Fellowship and National Principal Academy Fellowship last year. This year, Fortune is sending four more principals and three master teachers to complete the National Principal Academy Fellowship and the Instructional Leadership Professional Development programs. The Director of Curriculum & Instruction provides weekly professional development to Principals and Master Teachers to ensure they are consistently using the practices learned through RELAY.

Finally, Fortune leverages its Administrative Services Credential and District Intern Programs in its Higher Education department annually to develop school leaders

including Principals, Master Teachers, Lead Teachers, and Teachers for both itself and partnering districts in the Sacramento and Bay Area regions.

The Administrative Services Credential program provides candidates with the opportunity to complete projects aligned to organizational priorities while they complete their coursework. This year's cohort (cohort 6) includes three lead teachers, who are working on projects including: replicating the growth of Ephraim Williams College Prep, our middle school who has made significant growth over the last two years; developing a Kindergarten Academy to replicate our most successful kindergarten classes; and adapting the effective professional development for Middle School to the Fortune School model of Professional Development that focuses on the See It, Name It, Do It method we have learned through our work with RELAY. Our District Intern program trains teachers for the California Teaching Credential gives candidates the foundational coursework and support they need to launch their careers in education.

Instructional Time & Academic Schedule

Teaching and learning at a Fortune School is a choice that faculty, students, staff and parents make voluntarily. It requires an extraordinary commitment of time, patience and hard work. That's why we emphasize that Choice and Commitment (Pillar #2) is the mindset required to succeed in the Fortune Model. For example, Fortune scholars have a longer school day and a longer school year, giving them More Time (Pillar #3) to master academic content. We have a modified-year round schedule in which scholars attend school in three 10-week Trimesters. In between Trimesters, Fortune holds an Intersession program for students who are not yet learning at grade level in ELA and

Math. During Intersession, scholars work in small groups with their teachers to master standards that they have missed.

School Culture

More Time (Pillar #3) also applies to instructional time that Fortune teachers devote to teaching our scholars the school culture. Teachers spend the first 10 days of school teaching scholars our school culture, meaning our expectations for student behavior as well as the routines and procedures a Fortune School scholar is expected to know. Teachers revisit these expectations after every break when students return to school. We call this practice Setting the Tone for Learning and it is a fundamental part of the Fortune Model. Teachers participate in professional development to learn how to Set the Tone for Learning. We monitor teacher effectiveness in this area using an observation instrument. Our approach is to teach scholars everything and assume nothing. For example, we teach scholars how to walk in the hallways using a procedure called HALL; how to sit-up, listen and ask questions through a procedure called SLANT and how to use hand signals to ask basic questions like “may I sharpen my pencil.” Citizenship is Pillar #5 so, we also teach our scholars to be good citizens using Kohlberg’s Six Levels and Character Counts. Student behavior is monitored and supported in various ways including:

- Classroom Dojo - online student behavior management system where each student has an avatar that gains and loses points according to their behavior in class and makes reports to parents in real time through an app
- Deans of Students who are certified behavior analysts/specialist implement student board-adopted behavior expectations published in Fortune School’s student

handbook and provide social skills classes and individual behavior plans for students who need extra support.

In addition, scholars are expected to participate in a class community service project each Trimester. Participation in the class community service project is a requirement for Honor Roll along with academic expectations. This focus on a school-wide culture of High Expectations (Pillar #1) and Citizenship (Pillar #5) is a distinguishing feature of Fortune School campuses.

Meeting transportation needs

FSE meets the transportation needs of its scholars through a partnership with the Sacramento Transit Regional Authority that provides free public transportation for all our students. Each student is provided for no cost, an annual pass to the public transportation system in Sacramento so they can ride buses or light rail to school.

Selection Criteria B2:

Fortune Recruits and Enrolls a high percentage of Educationally Disadvantaged Students

Fortune School of Education (FSE) currently operates two charters 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 by increasing the availability of a rigorous, college preparatory K-12 program for these students throughout the county. True to our 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.

Fortune School of Education is committed to serving educationally disadvantaged subgroups. Over 80 percent of our scholars qualify for free and reduced lunch. We serve smaller percentages of students with disabilities and English Learners, in part because we recruit heavily from the lowest performing racial subgroup: African American students. We have maintained these demographic rates while dramatically increasing enrollment over the past five years.

Fortune School of Education grew from 1,281 students in 2014-15 to 1,856 in 2019-20. Throughout that period of expansion, our percentages of African American and Latino students remained very high. Our percentage of socio-economically disadvantaged students has dropped a few percentage points as the economy in California has improved, but it has consistently remained above 75% economically disadvantaged. Therefore, as we expand our charter schools, we expect that these demographic rates will remain consistent or increase.

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, our team researched the most impoverished areas around the city where we 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 our Sacramento charter by adding two new sites in Sacramento.

1. Open Tecoy Porter College Prep serving grades K-5

- o This school will be located in the high need community of South Sacramento
- o 45.7 percent of residents of south Sacramento are below the poverty line, compared to 20.3 percent of all Sacramento county
- o 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
- o FSE projects that they will add 400 new high quality seats to this school

2. Open a Second New Elementary Site serving grades K-5

- o This school will be located in the high need community of South Sacramento
- o 45.7 percent of residents of south Sacramento are below the poverty line, compared to 20.3 percent of all Sacramento county
- o 36.2 percent of residents in south Sacramento residents have less than a high school diploma; only 9 percent have a college degree and 8.2 percent have a college degree or higher

- o FSE projects that they will add 270 new high quality seats in grades K-3 to this school during the grant period. It will eventually enroll 380 in grades K-5.

These new and expanded schools will add 670 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.

Fortune is Committed to Recruiting and Enrolling Educationally Disadvantaged Students

FSE accepts all students through an open enrollment, lottery process. We welcome students of all emotional, physical, or learning disability or linguistic needs, and of all racial, ethnic, and economic backgrounds. FSE has been actively providing parents 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 our 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 our 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.

Lottery and Enrollment Procedures

If the number of applications does not exceed the capacity of Fortune School, there will be no lottery, and all students who submitted complete applications are enrolled. In the event that the number of students seeking admission to any grade level exceeds capacity, a lottery is held. It is completed by pulling slips of paper with applicants' names on them out of a container, and the drawing is held in a public forum. All names are drawn from the container and those exceeding the number of available spaces are placed on a waiting list in the order drawn. Fortune School may grant priority in admissions to current students and residents of Sacramento County, as provided in current law. The school may also grant admission preference to children of founders and children of school faculty, provided that students admitted under any such preference shall not constitute more than 10 percent of the school's total enrollment.

The waiting list from a prior year is rolled over to the next year in the order in which students were originally placed on the waiting list, except for students who have preference. Students with preference supersede the waitlist as follows:

- (1) children and grandchildren of founding members of Fortune School;
- (2) children of FSE employees;
- (3) siblings of existing students

After the lottery, families receive their official enrollment forms and are informed of the enrollment process detailed in Fortune School's policies and procedures. Currently-enrolled students do not participate in the random drawing, as they are automatically reserved a space for the following year. Other categories of students who do not participate in the random drawing, provided that there is space, in the following order are:

1. Existing students of Fortune School,
2. Children and grandchildren of founding members of Fortune School,
3. Children of FSE employees
4. Siblings of existing students;
5. Pupils placed on the waiting list in previous year(s)
6. Pupils who reside in Sacramento County.

Admission is not based on prior student performance or admission testing.

The difference flexibility makes

Legally, a significant portion of state education law does not apply to charter schools. Fortune School of Education utilizes that flexibility to try to serve students better. One important example: we give our scholars more instructional time. We have

a longer school day, from 7:30 to as late as 4:00 in some grades. We create a longer school year by inviting lower-performing scholars to voluntary “intersession” days between trimesters. We offer voluntary Saturday school for scholars who need extra help. Our ability to provide scholars with more time is crucial to accelerating their academic growth.

We also are able to make changes relatively quickly. After the transition to Common Core and a new testing system, we knew that our scores were low and not growing as fast as we wanted. After talking with high performing charter networks, we realized that we need to make some fundamental changes. So we did. We switched all our curricula and began requiring that teachers use techniques - such as the Habits of Discussion - that make scholars active participants in their classrooms. Most districts in California are, at best, in the middle of similar changes. Our ability to make large-scale changes quickly gave us a head start and allowed us to grow much faster than almost anyone else.

Selection Criteria C:

Quality of the Project Design and Evaluation Plan

The story of FSE is a story of sustainable, quality growth. We serve disadvantaged students and help them to out-perform similar students both statewide and at nearby schools. Our 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 overarching goals:

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

Selection Criteria C1: Conceptual framework

Every plan relies on a conceptual framework. Who is going to take what actions, and why do we expect those actions to produce our desired results? Our theory of action centers on **our team leaders** (e.g. recruitment team) **and site principals**. We believe that team leaders and site principals are in the unique position where they both understand the needs within their jurisdiction and know the resources available at our central office. Problems get solved and improvements occur when leaders and principals connect central office resources to the needs of their team or site.

Additionally, leaders and principals play a crucial role in conveying the importance of fidelity to our Fortune Model. To be sure, other staff are vitally important. We simply believe that leaders and principals play a uniquely important role.

Our conceptual framework also assumes that **the Fortune Model is effective**. That does not mean it is perfect, but it does mean that we adhere to the model unless we

make a conscious choice to do otherwise. We did not create our model from scratch; we borrowed ideas from other successful schools and research-proven practices. For example, research shows that increased learning time improves academic and non-academic outcomes, especially for students below grade level.³ We use open-source curricula from Achievement First because that organization has used them to help students reach incredibly high levels of achievement.⁴ We have an early college high school because research shows that the early college model improves English scores, graduation rates, and college enrollment rates.⁵ Additionally, our model has produced impressive results over the past several years, as seen in Figures 1 and 2 under Selection Criteria A1.

Therefore, our conceptual framework posits that the main challenge is implementing our model with fidelity. Implementing well is extremely difficult; RAND wrote an entire book detailing the difficulties of implementing reform.⁶ One strategy is to try to focus on different aspects of our model sequentially. For example, we focus first on helping staff, students, families understand Fortune culture. After that, we focus on the level of

³ Kidron, Yael, and Jim Lindsay. "The Effects of Increased Learning Time on Student Academic and Nonacademic Outcomes: Findings from a Meta-Analytic Review. REL 2014-015." *Regional Educational Laboratory Appalachia* (2014).

⁴ <https://www.achievementfirst.org/how-we-work/our-results/>

⁵ Berger, Andrea, et al. "Early College, Early Success: Early College High School Initiative Impact Study." *American institutes for research* (2013).

⁶ https://www.rand.org/pubs/monograph_reports/MR1498.html

academic rigor. A second strategy is to help team leaders and principals track our progress. We have weekly “Principal Meetings” with principals, team leaders, and the CEO. At these meetings we look at our dashboards and discuss how we are doing in terms of reaching our goals. Finally, our strategy believes in the importance of high-level accountability. The CEO regularly meets with principals and team leaders individually to discuss what resources may be needed to reach our goals.

For this expansion into two more schools, we have learned from our past growth opening 8 schools over the past 10 years. One step we are implanting during this expansion is to move a highly successful school leader from one of our more established sites, to lead the expansion for 2 years while training the new principal. We believe that by having two administrators on site, many of the growing pains that exist when opening a new school will be mitigated. This same experienced school leader will then move to open the next new school and train up that new principal for 2 years. By truly replicating what has been highly successful at our other campuses with even the same leaders being part of the growth, the student outcomes is expected to be exceptional.

Selection Criteria C2: Logic model

How will we track progress in the short- and medium-term as well as measure our success in the long-term? Writing our plan as a logic model forces us to make our assumptions explicit. FSE uses terminology from the Education Logic Model developed by the Regional Educational Laboratory (REL) Pacific: resources, activities, outputs,

and short-, medium-, and long-term outcomes.⁷ Everything leads to the long-term outcomes, which FSE also calls performance measures. These are how we 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. Those outcomes are listed in the middle section, along with baseline results and targets for the next five years. The bottom portion of each table explains the data collection and reporting process.

Tables 7-9: Logic Model for Project

Goal 1: Serve and Retain Academically Disadvantaged Students

Resources: Recruitment team; maps with neighborhood-level demographic information

Activities: Recruitment team increases their focus on students with disabilities and students whose primary language is not English

Outputs: More enrollment meetings with students with disabilities and students whose primary language is not English

Short-Term Outcomes: More applications from students with disabilities and students whose primary language is not English

Medium-Term Outcomes: Increased percent of students with disabilities and English Learners

Long-Term Outcomes: See Below

⁷ <http://relpacific.mcrel.org/resources/elm-app/>

Performance Measure	Baseline	20-21	21-22	22-23	23-24	24-25
% of economically disadvantaged students	79%	80%	80%	80%	80%	80%
% of students with disabilities	8%	9%	10%	11%	12%	13%
% of English Learners	7%	9%	10%	11%	12%	13%

Data collection and reporting: Recruitment team will track the disability status and primary language of prospective students; Data team will report application and enrollment data; information system reports % of students by demographic group

Goal 2: Help Students Attain High Levels of Achievement

Resources: Dashboards display detailed data about assessments and chronic absence

Activities: Teachers and principals use results to target interventions; central office uses results to target support, adjust professional development, and identify best practices

Outputs: Professional development, supports, and practices improve; Teachers and principals adopt successful interventions and avoid unsuccessful ones

Short-Term Outcomes: Higher scores on local assessments and improved attendance

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

assessments as well as lower chronic absence rates

Long-Term Outcomes: See Below

Performance Measure	Baseline	20-21	21-22	22-23	23-24	24-25
Academic Growth: change in Distance from Met, Smarter Balanced ELA/Math	19 / 21	7 / 7	7 / 7	7 / 7	7 / 7	7 / 7
Academic Achievement: % Met, Smarter Balanced ELA/Math	47% / 47%	50% / 50%	53% / 53%	56% / 56%	59% / 59%	62% / 62%
Chronic Absence rates	20.0%	18.5%	17.0%	15.5%	14.0%	12.5%

Data collection and reporting: The data team uses the student information system to create dashboards with assessment and chronic absence information. The state provides Smarter Balanced assessment results during the summer, which we use to calculate achievement and growth.

Goal 3: Sustainably Grow the Fortune Model

Resources: Student and staff surveys;

Activities: Recruitment team pursues enrollment targets; Teachers provide feedback about job satisfaction; students report feelings about school

Outputs: Effective recruitment efforts; Principals and central office respond to teacher and student feedback

Short-Term Outcomes: Enrollment application targets met; Teachers appreciate responsiveness to their feedback; students feel more connected to school

Medium-Term Outcomes: Census day enrollment targets met; Teachers and students report higher satisfaction and connectedness

Long-Term Outcomes: See Below

Performance Measure	Baseline	20-21	21-22	22-23	23-24	24-25
# of Students / Sites	1856 / 7	2100 / 8	2250 / 8	2450 / 9	2700 / 9	2900 / 9
Retention of core academic teachers	75%	78%	81%	84%	87%	90%
Retention of students	87%	89%	90%	91%	92%	93%

Data collection and reporting: Data team uses the student information system to track student enrollment and retention. Human Resources maintains and staff information and provides to the data team upon request to calculate teacher retention.

By the end of the grant period, we will have quantitative data to show the extent to which we are above or below our goals. We also will have qualitative data to help us evaluate how we were able to achieve those goals. The data team will have discussions with teachers to see how they feel about professional development, as well as discussions with recruitment staff to learn what strategies work best for meeting enrollment targets. Open-ended survey responses will provide insight into how students feel about school.

Selection Criteria C3: Clear and measurable goals

Fortune has outlined the goals, objectives and outcomes to be achieved in detail in the tables above. These goals are based on years of experience operating high quality schools and following processes where Fortune has successfully closed achievement gaps for educationally disadvantaged students. We believe that each of these goals are achievable and when achieved, will result in strong educational outcomes for our scholars. As described in the tables, above, these goals are focused on ensuring Fortune enrolls an educationally disadvantaged population of students, these students are attending school regularly and succeeding academically, and finally, that Fortune is retaining its students and teachers at high rates to continue to grow the schools sustainably.

Selection Criteria C4: Documenting Effective Project Activities and Strategies

We will implement our project in a way that produces information about the effectiveness of particular actions and strategies. Two processes make this possible. One process is ongoing, and is related to the short-term outcomes listed in the tables above. We detail this ongoing process in section D2 below. The other process occurs annually during our planning phase of the year, and is related to the medium- and long-term outcomes listed in the tables above. We describe this second, annual process here.

We measure long-term outcomes once each year. The data team uses the student information system to measure enrollment as well as the percent of students in each educationally disadvantaged group on Census Day, the first Wednesday in October. The state sends us student-level Smarter Balanced ELA and Math summative assessment results each June. The data team uses those results to calculate academic achievement and growth. At the end of the school year, the data team uses reports from the student information system to calculate final chronic absence and student retention rates, and reports from the human resources department to calculate teacher retention rates.

This annual data collection supports annual evaluations that determine lessons learned. The data team uses those long term outcomes to conduct a variety of analyses: compare sites and grade levels to one another, compare current year to prior year outcomes, and compare groups of students who received different interventions. We conduct the most rigorous evaluation possible given the style of implementation. For example, we used cutoffs to determine whether or not students needed a literacy

intervention. The use of cutoffs enabled us to conduct a regression discontinuity analysis that produced an unbiased estimate of the impact of that literacy intervention. When an intervention only occurs in certain grades, then we compare those grades' performance to those same grades in previous years as well as to other grades in the current year. We make that comparison using multivariate regressions that control for as many related observable factors as possible: special education status, English Learner status, prior scores, attendance rates, behavior issues, etc. The data team may complement the quantitative analyses with qualitative information collected through communication with staff and/or students. For each outcome, the data team creates a – usually one page – summary of key findings, lessons learned, and recommendations. Those outcome summaries are then shared with the relevant decision-makers during their planning process. For enrollment outcomes, the summaries are shared with the recruitment team by November. This allows the recruitment team to review the lessons learned and decide on any changes before the new recruiting season begins in earnest in January. The recruitment team also has time to make requests in the upcoming school year's budget, which needs to be finalized during May in order to be approved by the Board in June.

For other outcomes (academics, retention, and chronic absence), there is a timing problem. We don't have final outcome data until the end of the school year in June, so the data team can only create outcome summaries by early July. By that point, the next school year's budget is already finalized and approved by the Board. Those summaries can only inform the more detailed planning process for the upcoming school year that occurs in July and August.

In order to inform larger budget decisions, we therefore rely on medium-term outcomes. We administer NWEA MAP interim assessments in early March, and over the past four years we have found those results to be highly predictive of student scores on the Smarter Balanced assessments in May. The data team therefore creates a summary evaluation of that medium-term outcome in March, before major decisions about the upcoming school year have been made. Additionally, we can measure retention and chronic absence data at any point in the school year. The data team therefore pulls that data in March and conducts evaluations by April – in time for budget conversations. While the data does not reflect the entire school year, those medium-term outcomes from March are highly correlated with the long-term outcomes we measure at the end of the school year. The patterns we see nearly always tell the same story.

Finally, we believe strongly in the importance of sharing what we learn. We want all students to succeed, and that means that all schools need to improve the way we operate. The data team regularly presents our work and findings at many conferences including, the annual California Charter Schools Association conference, Charter School Development Center conference, and California Educational Research Association (CERA) conference. In November 2019, our Senior Data Analyst Dr. Dominic Zarecki won the Outstanding Paper Award from CERA. He will be presenting his paper at the national American Educational Research Association conference in April 2020. We will continue to present our results and lessons learned to as broad an audience as possible.

Selection Criteria D:

Quality of project personnel and management plan

Selection Criteria D1: 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 a 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 11 years. Resumes for the executive leaders can be found in Appendix B.

Executive Leadership Team

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 the University of California, Berkley and her Master's degree in Public Policy from Harvard University.

Bonnie Bensen

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, Analytics and Strategy

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.

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.

School Leadership Teams

Tamara Williams

Future Principal – Tecoy Porter 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.

New K-5 School Principal has not yet been selected

Typically, Fortune will identify a principal 12 months in advance of opening a new school. This allows the future school leader to learn at the feet of an experienced school principal and build community at their new location. The Fortune leadership team will be selecting a new leader for this school sometime during the 2020-21 school year.

Selection Criteria D2: Procedures for feedback and continuous improvement

Section C4 above explains how we evaluate the impact of our efforts in order to learn and improve decision making on an annual basis. This section focuses on the data we collect and actions we take during the school year to make adjustments and improve our work.

One feedback and continuous improvement process involves **improving the fidelity of implementation**. It is difficult to get a group of people to make a series of tightly coordinated actions. We monitor implementation closely and expect some non-compliance. Regular observations by principals or central office workers track the

extent to which staff implement the *Fortune Model* – i.e. our agreed upon structure and interventions for the current year. Individual or group discussions can elicit details about obstacles to full implementation. A variety of actions can improve fidelity.

Perhaps new teachers need to be given additional time and coaching to feel confident adopting a new approach learned in professional development. Maybe facilitating the sharing of success stories and lessons learned will encourage new teachers to adopt the new approach. Information from observers and participants can suggest which efforts are most likely to be successful.

A second feedback and continuous improvement mechanism involves **improving the *Fortune Model***. Even when implementation occurs with fidelity, impact can vary across students. This could be caused by differences in context or in differences in the form of implementation. Students may benefit the most from a literacy intervention if they have strong reading comprehension skills (but weak literacy skills), or if they are interested in the content they read. Schools with a higher percentage of those students would experience a larger impact. Alternatively, literacy programs may have better impact when they are part of full-class instruction instead of a pull-out with a small group of students. Schools therefore would obtain a greater impact if they implement the intervention in as full-class instruction. And of course, sometimes an intervention simply does not have the desired impact. The faster we learn what makes the right impact and what does not, the faster we can adjust our own work to better reach our goals.

To learn what is working during the year, we need to continuously collect and analyze a large amount of information. The list below explains what data we will collect, how it will

be reported and analyzed, and how that data will be used to make improvements and course corrections during the school year:

- **Smarter Balanced summary assessments.** We administer these state summative assessments each May and receive student results by the end of June. The data team imports the data into our student information system, where staff have access to the data for their own students. The data team also writes a summary of results and lessons learned based. While this is too late to inform budget decisions, it does inform decisions about how to utilize the resources we have. For example, we use Smarter Balanced results to evaluate the work we did between March NWEA administration and May testing. When sites or grades see a relatively large increase or decrease, the data team initiates conversations to help determine why those results occurred. Staff then use those insights to inform the work we do the following year.
- **NWEA MAP interim assessments.** Each trimester we administer this computer adaptive assessment to all our scholars. The day after testing is complete, our data team exports the results from the NWEA website and imports it into our student information system. This allows all staff to have access to NWEA scores for their scholars. Teachers can immediately see which scholars made desired growth and which did not. The data team also conducts an analysis of the results and produces a summary document – usually one page - explaining lessons learned and recommendations. That summary is presented to principals and central office staff. Areas of weakness receive additional support, such as extra time with Master Teachers. Evaluations of particular interventions (e.g. a

new ELA curriculum for grades K and 1) teach us the extent to which we should make adjustments to the interventions.

- **Formative assessments.** Every few weeks, scholars take a short formative assessment in ELA and Math. Teachers input the answers directly into the student information system, and the master teachers then have access to all the scores in their grade and subject. This information helps master teachers to track how their teachers are doing, and they use this information to provide targeted feedback and support.
- **Application records.** Starting in January, the data team collects all new student applications and enrollments for the upcoming school year. This information is tracked in real-time, and all relevant staff have access to view it. Additionally, the data team sends out periodic email updates explaining how close we are to meeting all our enrollment targets. This allows the recruitment team to assess their work and make adjustments, such as focusing on recruiting near particular school sites.
- **Enrollment records.** Our student information system maintains real-time data on enrollment and demographics. This allows the data team to produce reports that display the extent to which we are reaching our various goals: overall enrollment, the percent of students by group, and the retention of students over time. If retention drops in a particular grade and site, that often indicates staff issues that need to be addressed. The data team regularly provides this information to the principals and central office so that they can take appropriate action.

- **Attendance records.** Our student information system maintains real-time attendance data, allowing the data team to produce chronic absence reports. If chronic absence spikes in a particular area, central office staff ask principals to take action to try to reverse the trend. Additionally, the data team sends out automatic letters to families throughout the year as scholars reach specific numbers of unexcused absences. The letters serve as warnings at first, then require parent-principal meetings, and finally escalate to official meetings to discuss the consequences of continued absence from school.
- **Student Surveys.** Each year, we administer school climate surveys to all our middle school scholars. The surveys contain some questions from the California Healthy Kids survey, which allows us to compare our students to others in the state and county. Our surveys also contain questions that we believed to be important, such as about college ambitions and family life. As soon as the surveys are completed, the data team is able to evaluate all the anonymous responses and look for patterns over time, by site, and by grade. The data team shares the results with middle school staff. Seeing that his scholars felt disconnected from school, one middle school teacher started a Senate club that helped students to fundraise and make their own decisions about things, such as where to go on a field trip and what changes to make around school. Next year, the teacher will be able to see the extent to which his action improves student feelings about connectedness.
- **Teacher Surveys.** We will begin administering teacher surveys in order to learn how teachers feel about working at Fortune School of Education. The data team

will share results with principals and central office staff so that we can take actions to try to increase staff satisfaction.

- **Staff records.** Human resources maintains records about all staff. The data team periodically requests this data in order to analyze teacher retention. There are not enough teachers in our system to conduct robust quantitative analyses. After identifying large patterns, the data team can initiate conversations about why retention is particularly high or low at certain sites or in certain years. This can help principals and central office staff to reflect on what changes could be made to improve teacher retention.

Other Attachment File(s)

* **Mandatory Other Attachment Filename:**

[Add Mandatory Other Attachment](#)

[Delete Mandatory Other Attachment](#)

[View Mandatory Other Attachment](#)

To add more "Other Attachment" attachments, please use the attachment buttons below.

[Add Optional Other Attachment](#)

[Delete Optional Other Attachment](#)

[View Optional Other Attachment](#)

Charter Schools Program Assurances – Grants to Charter School Management Organizations for The Replication and Expansion of High-Quality Charter Schools

Pursuant to Title IV, Part C of the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the Every Student Succeeds Act (ESSA), applications for Grants to Charter School Management Organizations for the Replication and Expansion of High-Quality Charter Schools must provide the assurances described below.

As the duly authorized representative of the applicant, I ensure that:

1. The eligible applicant will support charter schools in meeting the educational needs of their students, as described in section 4303(f)(1)(A)(x) of the ESEA (Section 4303(f)(2)(B) of the ESEA);
2. Each charter school receiving funds under this program makes publicly available, consistent with the dissemination requirements of the annual State report card under section 1111(h) of the ESEA, including on the website of the school, information to help parents make informed decisions about the education options available to their children, including—
 1. Information on the educational program;
 2. Student support services;
 3. Parent contract requirements (as applicable), including any financial obligations or fees;
 4. Enrollment criteria (as applicable); and
 5. Annual performance and enrollment data for each of the subgroups of students, as defined in section 1111(c)(2) of the ESEA, except that such disaggregation of performance and enrollment data shall not be required in a case in which the number of students in a group is insufficient to yield statically reliable information or the results would reveal personally identifiable information about an individual student. (Section 4303(f)(2)(G) of the ESEA)
3. The eligible entity has sufficient procedures in effect to ensure timely closure of low-performing or financially mismanaged charter schools and clear plans and procedures in effect for the students in such schools to attend other high-quality schools. (Section 4305(b)(3)(C) of the ESEA).

Bonnie Bensen, CFO

NAME OF AUTHORIZED OFFICIAL, TITLE



SIGNATURE OF AUTHORIZED OFFICIAL

Fortune School of Education

APPLICANT ORGANIZATION

11/9/2020

DATE SUBMITTED

Charter Schools Program Assurances – Grants to Charter School Management Organizations for The Replication and Expansion of High-Quality Charter Schools

Pursuant to Title IV, Part C of the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the Every Student Succeeds Act (ESSA), applications for Grants to Charter School Management Organizations for the Replication and Expansion of High-Quality Charter Schools must provide the assurances described below.

As the duly authorized representative of the applicant, I ensure that:

1. The eligible applicant will support charter schools in meeting the educational needs of their students, as described in section 4303(f)(1)(A)(x) of the ESEA (Section 4303(f)(2)(B) of the ESEA);
2. Each charter school receiving funds under this program makes publicly available, consistent with the dissemination requirements of the annual State report card under section 1111(h) of the ESEA, including on the website of the school, information to help parents make informed decisions about the education options available to their children, including—
 1. Information on the educational program;
 2. Student support services;
 3. Parent contract requirements (as applicable), including any financial obligations or fees;
 4. Enrollment criteria (as applicable); and
 5. Annual performance and enrollment data for each of the subgroups of students, as defined in section 1111(c)(2) of the ESEA, except that such disaggregation of performance and enrollment data shall not be required in a case in which the number of students in a group is insufficient to yield statically reliable information or the results would reveal personally identifiable information about an individual student. (Section 4303(f)(2)(G) of the ESEA)
3. The eligible entity has sufficient procedures in effect to ensure timely closure of low-performing or financially mismanaged charter schools and clear plans and procedures in effect for the students in such schools to attend other high-quality schools. (Section 4305(b)(3)(C) of the ESEA).

Bonnie Bensen, CFO

NAME OF AUTHORIZED OFFICIAL, TITLE



SIGNATURE OF AUTHORIZED OFFICIAL

Fortune School of Education

APPLICANT ORGANIZATION

11/9/2020

DATE SUBMITTED

Appendix B

Resumes of Project Director and Executive Personnel Identified in the Application

- 1) Margaret Fortune, President/Chief Executive Officer
- 2) Bonnie Bensen, Chief Financial Officer
- 3) Michelle Grace, Chief Operating Officer
- 4) Matt Taylor, PROJECT DIRECTOR, Director, Data, Analytics and Strategy
- 5) Wes Pepper, Director, Curriculum and Instruction

Margaret Fortune

President/CEO

Margaret Fortune is President/CEO of Fortune School. In 2010, under Fortune's leadership, the organization launched a network of K-12 public charter schools in Sacramento and San Bernardino counties with the mission to close the African American achievement gap. The network currently includes seven public charter schools with a combined enrollment of more than 1,500 students. Fortune also operates the Rex & Margaret Fortune School of Education, a graduate school that credentials teachers and school administrators for over 50 public school systems with the goal of addressing the state's teacher shortage by producing quality, diverse teachers in high-need subject areas. The graduate school's charter school leadership program has also been critical in developing a pipeline of strong educators in the movement. In 2017, Fortune opened an early college high school in partnership with Cosumnes River College and Cal Poly San Luis Obispo focused on science, technology, engineering, art and math. Students are able to earn a high school diploma and associate's degree upon graduation. Fortune is a state and nationally recognized education advocate. She led the efforts that resulted in the State of California budgeting a new \$300 million block grant in 2018 for the lowest-performing students. A graduate of UC Berkeley and Harvard University's Kennedy School of Government, Fortune served as education adviser to two California governors. Fortune is a Trustee Emerita of the California State University, a Pahara-Aspen Fellow and board chair for the California Charter Schools Association. She was awarded an honorary doctorate from Cal Poly San Luis Obispo for her substantial contributions to the field of education.

Michelle A. Grace

Work Experience

June, 2009 – present

Chief Operating Officer
Fortune School of Education

Oversees facilities management, legal affairs, graduate student admissions, information technology, procurement, governance and all administrative operations. Responsible for all aspects of Human Resources. Helped launch seven successful charter schools by providing high quality operational management including professional development to school employees. Led an \$80,000 branding project at Fortune School of Education which launched marketing materials featuring a new logo and messaging platform, business suite, interior and exterior signage at two Fortune School campuses.

July, 1995 to June, 2009

Administrative Secretary
Center High School

Administrative clerical support to the School Principal and Assistant Principals including, but not limited to: appointments/travel arrangements; employee memorandums, emails, meeting agendas, employee evaluations, confidential/sensitive documents; Office Manager for seven-member clerical staff; purchasing for eleven departments and extensive related budget maintenance; work orders; substitute teacher contact/coordinator; extensive typing, telephones, filing, email; technology proficient; high profile published projects including, but not limited to event programs, student packets, monthly parent newsletter, student handbook, school evaluation report; extensive customer service to community members, co-workers, district employees and administrators; sole clerical staff on duty during the summer months serving the public.

October, 1992 – July, 1995

Staff Secretary
Center Unified School District
Office of Curriculum, Instruction & Public
Relations (CIPR)

Administrative clerical support to the Director of CIPR including, but not limited to: organization of district testing materials for over 3,000 students; appointments/travel arrangements; memorandums, meeting agendas, purchasing and related budget maintenance; work orders; Parent Link monthly newsletter; extensive typing, telephones, filing, technology proficient; extensive customer service to parents, Board Members, and District employees.

Education

American River College – Associate in Arts – Social Science – Highest Honors
Currently enrolled at Sacramento State University – Major: History

Bonnie Bensen

Education

1988 BSC, Accounting, Santa Clara University, Santa Clara, CA - Cum Laude

Experience

Jan. 2010 - Present

Chief Financial Officer - Fortune School of Education, Sacramento, CA

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.

1994-2009

Self-employed

- Independent Contractor providing business and consulting services to various clients including:
- Developing the business office procedures manual for the charter schools within the Twin Ridges Elementary School District.
- Serving as the Interim Chief Financial Officer of St. HOPE Public Schools which includes both an elementary charter school and a charter high school.
- Providing ABI200 oversight to a financially troubled joint district/county office of education under contract with the California Department of Education.
- Providing budgetary oversight and Citizen's Oversight Committee reporting for more than \$88,000,000 of bond funded school construction projects for Sierra Community College District.
- Serving as the Interim Fiscal Services Director for several school districts including Fairfield Suisun Unified School District, Natomas Unified School District, Amador County Unified School District, Amador County Office of Education, River Delta School District and San Leandro Unified School District.
- Completing specialized accounting projects for several school districts including the former Grant Joint Union High School District, North Sacramento Elementary School District, Tuolumne JPA, El Dorado County Office of Education, Center Unified School District, Yuba Community College and Sierra-Plumas Joint Unified School District.
- Established and maintained the accounting systems and prepared all financial records for Rex and Margaret Fortune School of Education, formerly Project Pipeline.

1992-1994

Accounting Manager - Center Unified School District, Antelope, CA

- Prepared, monitored and maintained a 20 million dollar budget.
- Oversaw general ledger maintenance.
- Prepared all state financial and attendance reports.
- Provided auditors with necessary support and assistance.
- Trained and supervised a staff of four people.

1991-1992

Accounting Manager - GFS of California, Rancho Cordova, CA

- Cash flow analysis and cash management.
- Financial statement preparation for corporate reporting.
- Supervision of staff property accountants and the production of financial statements for over 1,800 apartment units and 370,999 square feet of commercial retail space.
- Participated in presentations for the development of new business.

1988-1990

Senior Accountant - Ernst and Young, San Jose, CA

- Participated in audits and reviews for several companies in the technology, health care and manufacturing industries.
- Made recommendations to management based upon audit findings.
- Reviewed the work of first year audit staff.
- Spent one tax season preparing individual tax returns.

MATTHEW D. TAYLOR

PROFESSIONAL EXPERIENCE

January 2016 – Present *Fortune School of Education* Sacramento, CA

Director Data, Analytics, and Strategy

As the Director of Data, Analytics and Strategy at a rapidly growing Charter Management Organization with 6 schools serving a high poverty population, works to provide data to guide strategic decisions. Focused on implementation of student assessment data systems, student information systems, as well as training principals and teachers on effective uses of data to drive improvements in teaching and learning. Leads a team of data analysts to design high quality and actionable data reports including ad hoc requests, data dashboards, attendance and discipline data.

January 2015 – Present *Yolo County Board of Education* Woodland, CA

Elected Trustee, Representing the City of West Sacramento

As the elected representative of the residents of West Sacramento California, I have the honor of serving them on Yolo County Board of Education. Elected in November of 2014 and re-elected in November 2018, I gladly serve as one of five members on the board and help oversee the educational programs of the county office of education. These programs include, juvenile court schools, community schools, headstart, special education and other oversight of the six school districts in the county.

September 2018 – Present *William Jessup University* Rocklin, CA

Adjunct Professor

As an adjunct professor, I teach a course entitled, Cultural and Policy Implications of Education in the Masters of Education program. I explore with the students the intersection of practice and policy in education and how the students can improve equity and access for all students in their local context and how they can improve education policy at the district, county and state level.

July 2016 – June 2018 *Broad Center* Los Angeles, CA

Broad Resident

The Broad Residency in Urban Education provides the opportunity for outstanding management professionals to apply their skills and knowledge to meet the challenges faced by urban public school systems. Through our highly selective professional development programs, The Broad Residency in Urban Education, is growing a diverse network of leaders and managers in school systems across the nation — people who have the skills, knowledge and dedication necessary to ensure every student's needs are met.

MATTHEW D. TAYLOR

3815 TOPAZ ROAD • WEST SACRAMENTO, CA 95691

PHONE [REDACTED]

January 2014 – January 2016 *California Charter Schools Association* Sacramento, CA
Director, Research

As the Director of Research, works closely to coordinate resources to author and deploy cutting edge research reports and partner with leading researchers to achieve CCSA priority advocacy objectives. Responsible for the redesign of the CCSA public call for non-renewal and statewide charter accountability system. Works with the Achievement and Performance Management team to ensure that the public, the charter movement, and member schools have the best, most complete and actionable picture of performance at every level, while improving achievement outcomes for all charter students, and impacting policy to accelerate charter schools' success. Serves as a mentor to other analysts to build capacity within the organization. Involved in the policy conversations at the state board, PSAA advisory committee, and with CDE about revisions to the state's accountability system.

April 2010 – January 2014 *California Department of Education* Sacramento, CA

Education Research and Evaluation Administrator

As the Administrator of the Evaluation Research and Analysis Unit, was responsible for supervising 10 staff complete complex data analysis of education data, including longitudinal enrollment, assessment and accountability information. Review and approve government contracts, budgets, payroll and complex research projects. Use various database software to conduct research and evaluate the effectiveness of statewide educational programs. Develop and review extensive written work products that summarize education research reports and analysis of legislative action for programmatic and financial impact. Prepare written and oral presentations to be given to the legislature, the state board of education and educational leaders throughout California.

Oct 2007 – April 2010 *Office of the Inspector General* Sacramento, CA

Deputy Inspector General

Responsible for conducting various aspects of performance and compliance audits of the California Department of Corrections and Rehabilitation in a staff capacity. As staff, performed complex analytical analysis, which included collection and evaluation of data as well as interviewing and documenting audit evidence. Utilizing this compiled evidence and analysis, also wrote components of various public audit reports which were used by agency stakeholders and the Legislature to formulate more efficient and effective means to conduct state correctional programs. Also responsible for reviewing criminal and administrative investigations to be conducted by the Office of Internal Affairs.

MATTHEW D. TAYLOR

3815 TOPAZ ROAD • WEST SACRAMENTO, CA 95691

PHONE [REDACTED]

Jun 2007 – Oct 2007 *California Department of Education* Sacramento, CA

Education Programs Consultant

As a member of the special education investigative team, was responsible for investigating allegations of violations of state and federal special education laws. As an investigator, was required to conduct interviews with both the complainant and alleged violating district, to research all applicable laws and regulations, conduct a fact finding through a review of documentary and testimonial evidence, to gather evidence on site, and to ultimately make a conclusion as to whether a violation of law had occurred. The final disposition of the case took the form of a written report, which contained corrective actions that was given to the offending district or referred to the department's legal office for potential criminal investigation.

Feb 2005 – Jun 2007 *California Department of Education* Sacramento, CA

Education Research and Evaluation Consultant

Responsible for coordinating various programmatic functions of the California High School Exit Examination (CAHSEE). In order to facilitate the understanding of the statutory and regulatory requirements of the CAHSEE, responded to extensive request, in writing, verbally and in presentations to large groups. The requests originated from school districts, parents, visual and print media, as well as state control agencies and legislative staff. Developed, reviewed, and analyzed numerous legislative proposals which would impact the CAHSEE. Further, reviewed and coordinated many of the legal requests surrounding several pending lawsuits involving the CAHSEE. As the Data Steward for the CAHSEE program, was responsible for coordinating, analyzing, and reporting CAHSEE results to the public through press releases and on-line reporting. Additionally, was required to act as a liaison between the CAHSEE office and other divisions throughout the department to ensure that data collections were adequate to serve the needs of the department to comply with federal and state laws. As a coordinator for the CAHSEE office for the U.S. Department of Education peer review team, was required to analyze and collect data to support the department's efforts in seeking federal approval of California's assessment system under the No Child Left Behind Act. Further, was responsible for test security of the CAHSEE, which required designed an audit and investigative plan, a review of audit reports and directing contract investigators.

July 2001 – Feb 2005 *Bureau of State Audits* Sacramento, CA

Senior Auditor Evaluator

Responsible for conducting various aspects of performance, compliance and financial audits in either a staff or supervisory capacity. As staff, performed complex analytical analysis, which included collection and evaluation of data as well as interviewing and documenting audit evidence. Utilizing this compiled evidence and analysis, wrote components of various public audit reports which were used by agency stakeholders and the Legislature to formulate more efficient and effective means to conduct state programs. Further, in the supervisory capacity, reviewed the work of subordinate staff as well as prepared outlines, briefings, and analysis to executive management.

MATTHEW D. TAYLOR

3815 TOPAZ ROAD • WEST SACRAMENTO, CA 95691

PHONE ([REDACTED])

EDUCATION

December 2017 *Taft University* Denver, CO
Doctor of Education (coursework in progress – degree completion in 2020)

July 2018 *Broad Residency* Los Angeles, CA
Masters of Educational Leadership

April 2001 *Pepperdine University* Malibu, CA
Master of Arts in Public Policy

May 1999 *Linfield College* McMinnville, OR
Bachelor of Arts in Political Science
Bachelor of Arts in Economics

BUREAU OF STATE AUDITS REPORTS COAUTHORED

California's Charter Schools: Oversight at All Levels Could Be Stronger to Ensure Charter Schools' Accountability, November 2001

Department of Health Services: Its Efforts to Further Reduce Prescription Drug Costs Have Been Hindered by Its Inability to Hire More Pharmacists and Its Lack of Aggressiveness in Pursuing Available Cost-Saving Measures, April 2003

California Law Enforcement and Correctional Agencies: With Increased Efforts, They Could Improve the Accuracy and Completeness of Public Information on Sex Offenders, August 2003

California Public Utilities Commission: State Law and Regulations Establish Firm Deadlines for Only a Small Number of Its Proceedings, November 2003

Workers' Compensation Fraud: Detection and Prevention Efforts Are Poorly Planned and Lack Accountability, April 2004

POLICY PUBLICATIONS

“Success for English Learners in Charter Schools: An Exploration of English Learner Academic Achievement and Best Practices in California’s Charter Schools”, *California Charter Schools Association*, June 2015

“Portrait of the Movement: Five Year Retrospective – A Charter Sector Growing in Numbers and Strength”, *California Charter Schools Association*, August 2014

MATTHEW D. TAYLOR

3815 TOPAZ ROAD • WEST SACRAMENTO, CA 95691

PHONE [REDACTED]

“Competitive Cities: A Report Card on Efficiency in Service Delivery in America’s Largest Cities.” Reason Public Policy Institute, Policy Study #282, May 2001. (coauthored)

“Electronic Procurement: How Technology is Changing Government Purchasing.” Reason Public Policy Institute, E-Brief #111, February 2001. (coauthored)

“Innovative School Facility Partnerships: Downtown, Airport, and Retail Space.” Reason Public Policy Institute, Policy Study #276, December 2000. (coauthored)

“Airport School Open in Miami.” Privatization Watch, October 2000.

“Innovative School Partnerships: The Mall School Model.” Privatization Watch, September 2000.

AWARDS, HONORS AND VOLUNTEER POSITIONS

Yolo County Board of Education, Elected to Trustee Area I, 2014 - Present

Elected Board Member, California Education Researchers Association, 2017-Present

Board Member, Growth Public Schools, 2016-May 2019

Broad Resident, 2016-18 Cohort, 2016-2018

Elected Board Member, Delta Elementary Charter School, 2012-2014

Elected Board Member, Fremont Presbyterian Church, 2010-2012

Pepperdine University, Hansen Scholar, 1999 – 2001

John Brown Cook Foundation Fellow, 2000

Liberty Fund, Liberty Fellow, Fall 1999

Intercollegiate Studies Institute, Honors Fellow, 1998-1999

Certified Fraud Examiner, 2002 - present

Wesley A. Pepper
7934 Little Plum Way ♦ Antelope, CA 95843
(Phone) [REDACTED]

Objective: To be an administrator at a high performing school that actively closes the achievement gap.

CREENTIALS

Certificate of Eligibility Administrative Services Credential	8/1/2013
Clear Multiple Subject Teaching Credential	6/27/2013

EDUCATION

National Principal Supervisors Fellow , Relay Graduate School of Education	6/1/2017
Administrative Services Credential Course Work , Fortune School of Education	8/1/2013
Teach for America Fellow , Teach for America Bay Area Region, CA	2011-2012
M.S. Teaching , Pace University, New York, NY	June 2005
B.A. American Multi-Cultural Studies , Sonoma State University, Rohnert Park, CA	June 2003

ACHIEVEMENTS

Led systemwide curriculum development that led to 10 points of growth on the 2018 SBAC in MATH
Led systemwide curriculum development that led to 10 points of growth on the 2017 SBAC in Math
Led systemwide curriculum development that led to 4 points of growth on the 2018 SBAC in ELA
Led systemwide curriculum development that led to 4 points of growth on the 2017 SBAC in ELA

RELEVANT SKILLS & EXPERIENCE

Management Advising/Training

- Managed 6 principals for schools in the Fortune School Charter Management Organization.
- Managed 6 Master Teachers for schools in the Fortune School Charter Management Organization.
- Developed and Implemented Professional Development on: instruction leading to student mastery of Common Core State Standards, Data Driven Instruction, and Classroom Management for Schools in the Fortune School Charter Management Organization.
- Developed and implemented curriculum focused on School Culture and Curriculum & Instruction for Fortune School of Education's Administrative Services Credential Program.
- Revised and Implemented previously developed coursework for teacher interns at Fortune School of Education.
- Coached and Supervised District Interns in grades K-4 for Fortune School of Education.

Classroom Experience

- Analyzed student data to develop and implement comprehensive yearlong, monthly, weekly, and daily lesson plans for 6th grade ELA, 8th grade ELA, and 8th Grade History.

RELEVANT WORK HISTORY

Director of Curriculum & Instruction, Master Teacher, Testing Coordinator, Data Analysis and Accountability Team	07/12-Present
Fortune School of Education, Sacramento, CA	
Teacher-Leader, Department Chair	07/08 – 07/12
<i>St. HOPE Charter School District, Ps7 Middle School, Sacramento, CA</i>	
4th Grade Teacher Leader	09/07-06/08
<i>The Waterside School, Stamford, CT</i>	
Teacher/Teach For America Corps Member-Teacher Leader	09/03-06/07
<i>New York City Department of Education, Middle School 118, Bronx, NY</i>	

January 7, 2020

The Honorable Betsy DeVos
Secretary of Education
U.S. Department of Education
400 Maryland Avenue SW
Washington, DC 20202-0008

Dear Secretary DeVos:

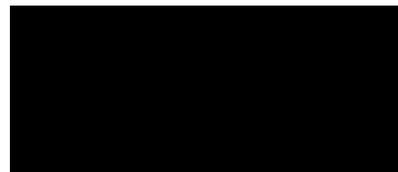
On behalf of the Charter School Growth Fund (CSGF), I am writing to express our strong support of the Rex and Margaret Fortune Charter Schools (Fortune) application for the Charter School Program Grants Competition for Replication and Expansion of High-Quality Charter Schools.

The Charter School Growth Fund (CSGF) is a non-profit that invests in the nation's highest-performing charter school operators to dramatically expand their impact on underserved students. Founded by national philanthropists to transform K-12 education, we have funded over 45 charter school management organizations (CMOs) that represent some of the most innovative and successful public school networks in the United States.

Fortune's charter school was founded in 2008 to provide students of Sacramento and San Bernardino, California, which boast the second and third largest African American student populations in California, with a high-quality education that prepares them to graduate from four-year colleges and universities. Under the leadership of Margaret Fortune, an African American Sacramento native who is working to support her home community, Fortune has built a network with a strong track record serving students who are 94% minority and 87% low-income. Fortune's charter schools are unique in their partnership with the local Black press in Sacramento and their connection to the Fortune School of Education which provides graduate schooling to aspiring teachers and administrators for charter schools and districts in California.

In 2013, CSGF supported Fortune's expansion within Sacramento from four to six schools through our Emerging CMO Fund which focuses on high performing charter organizations led by people of color. Fortune subsequently opened the first STEAM-based high school in Sacramento, allowing their students to earn an Associate's degree by the time they graduate high school. In 2019, CSGF committed to supporting Fortune's expansion of their next two elementary schools based on their track record of outstanding academic performance.

We respectfully ask that the Department of Education give strong consideration to Fortune's application and support them in serving more students throughout Sacramento.



Richard Billings
Partner & Assistant Secretary



January 9, 2020

Secretary DeVos
Secretary Department of Education
400 Maryland Avenue, SW
LBJ Education Building 7W311
Washington, D.C. 20202-0008

Dear Secretary DeVos,

On behalf of the Achievement First and the Charter Network Accelerator, I am writing to express our strong support of Fortune School's application for a Charter Schools Program Grant for Replication and Expansion of High-Quality Charter Schools (84.282M).

Achievement First (AF) is a growing network of non-profit, high-performing, college-preparatory, K-12 public charter schools in Connecticut, New York and Rhode Island. Since its founding, AF has consistently outperformed the host districts in which our schools are located and in many cases outperformed the state average. As we reflect on the trajectory of our network—now 37 schools and more than 14,000 students—relative to our mission, AF is proud of all that our students and educators have accomplished.

Unfortunately, there are still too few high-performing CMOs with the capacity to open new schools at the rate needed. To help meet this growing demand—and dramatically increase the life opportunities available to students from historically underserved communities—AF launched the Charter Network Accelerator in 2014. The goal of the Accelerator is to empower leaders to successfully scale their organizations by sharing the tools, practices and lessons learned from high-performing CMOs. The Accelerator is a highly selective program of 8-10 CMOs that have the greatest potential for future growth and success, as demonstrated by a strong track record of success, the capacity to expand and a CEO who is a "learner-leader," and focuses on helping CMO leaders align their networks to a college-ready bar, define their instructional, operational and organizational models, build their team and talent practices, and strengthen their personal leadership.

Fortune School completed the Accelerator Program in 2017. This includes an intensive set of workshops, one-on-one coaching and school visits. A team of experts spent two days at Fortune School on a "Critical Friends Visit" assessing both the strength of its schools and the network, and the team was incredibly impressed with the care and intentionality that has gone into the network's expansion to date. Fortune School has a strong foundation on which to build, and numerous assets, such as their unique connection to a strong talent pipeline through their school of education. They are meeting a critical need by serving low-income students of color through their educational programs and they are creating a pathway to college for thousands of children. Upon reviewing their application, I feel confident that you will see the transformative impact Fortune School has on the academic outcomes of the students they serve. We are proud to showcase the work of Fortune School to our current program participants.

I strongly believe that Fortune School is well positioned for growth in the years ahead and will continue to be a proof point of success in California. As an organization that has invested in and supported Fortune School's

leaders, I enthusiastically endorse Fortune School's application for a federal grant award to support its planned growth.

Sincerely,

Laina Vlasnik Yip
Director, Charter Network Accelerator Program
Achievement First
335 Adams St. Suite 700
Brooklyn, NY, 11201
[REDACTED]

State of California
Secretary of State

CERTIFICATE OF STATUS

ENTITY NAME:

REX AND MARGARET FORTUNE SCHOOL OF EDUCATION



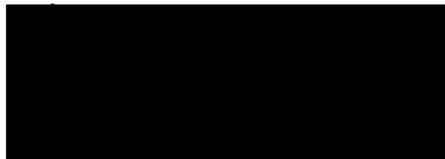
I, DEBRA BOWEN, Secretary of State of the State of California, hereby certify:

The records of this office indicate the entity is authorized to exercise all of its powers, rights and privileges in the State of California.

No information is available from this office regarding the financial condition, business activities or practices of the entity.



IN WITNESS WHEREOF, I execute this certificate and affix the Great Seal of the State of California this day of July 15, 2014.

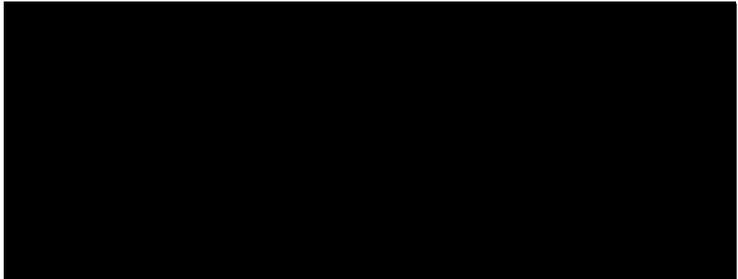


DEBRA BOWEN
Secretary of State

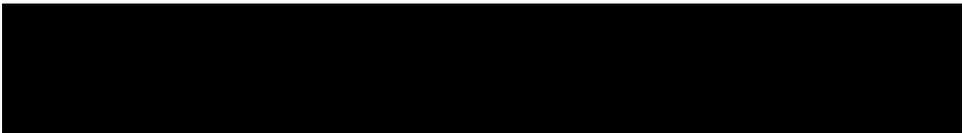


Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201



020180



Dear Taxpayer:

This is in response to your Nov. 08, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in September 1993.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(3).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.



REX AND MARGARET FORTUNE SCHOOL OF
EDUCATION
2890 GATEWAY OAKS DR STE 100
SACRAMENTO CA 95833-4327

If you have any questions, please call us at the telephone number
shown in the heading of this letter.

Sincerely yours,



Kenneth Corbin, Acting Director
Exempt Organizations

Appendix E

Schools Operated by the Applicant

List of Included Documents:

- 1) Fortune School (Sacramento) Charter Petition
 - a. This petition authorizes all schools in Sacramento
 - b. 9 schools in total are authorized
 - c. Fortune is currently operating 7 schools in Sacramento
 - d. This petition will allow for both new schools that are proposed in this project to be opened with no additional charter approvals necessary
- 2) Hardy Brown College Prep (San Bernardino) Charter Petition
 - a. This petition authorizes 1 school in San Bernardino
- 3) Documentation of whether the charter schools were established and are recognized as separate schools under state law
 - a. County School District (CDS) Code listings from the California Public School Directory for Fortune and Hardy Brown
- 4) Physical Locations of the schools including administrators at each site
 - a. Each of these schools listed have separate facilities, separate staff, separate student bodies and separate principals.



**FORTUNE SCHOOL
CHARTER RENEWAL**

**CHARTER SCHOOL NETWORK OF
REX AND MARGARET FORTUNE SCHOOL OF EDUCATION**

**Presented to:
SACRAMENTO COUNTY BOARD OF EDUCATION
Sacramento, California**

**Charter Renewal Term:
July 1, 2016 - June 30, 2021**

TABLE OF CONTENTS

A. EDUCATIONAL PHILOSOPHY AND PROGRAM	2
B. MEASURABLE STUDENT OUTCOMES	APPENDIX 4
C. METHOD BY WHICH PUPIL PROGRESS IS MEASURED	APPENDIX 4
D. LOCATION OF EACH CHARTER SCHOOL FACILITY	30
E. FOUNDERS AND GOVERNANCE STRUCTURE	31
F. HUMAN RESOURCES	36
G. HEALTH AND SAFETY	38
H. RACIAL AND ETHNIC BALANCE	41
I. AUDITS	41
J. DISCIPLINE, SUSPENSION/EXPULSION PROCEDURES	42
K. RETIREMENT SYSTEMS	46
L. DISPUTE RESOLUTION	46
M. EMPLOYEE REPRESENTATION	48
N. STUDENT ADMISSION AND ATTENDANCE POLICIES	49
O. PUBLIC SCHOOL ATTENDANCE ALTERNATIVES	51
P. RIGHTS OF COUNTY OFFICE OF EDUCATION EMPLOYEES	51
Q. CLOSURE PROTOCOL	52
FINANCIAL PLANNING, REPORTING AND ACCOUNTABILITY	53
ADMINISTRATIVE SERVICES	55
IMPACT ON CHARTER AUTHORIZER	56
GENERAL PROVISIONS OF THE PROPOSED CHARTER	57

APPENDICIES

- I. Finding of Facts
- II. Bell Schedule
- III. Academic Calendar
- IV. Local Control Accountability Plan (LCAP)
- V. Articles of Incorporation
- VI. Corporate Bylaws / 501(c)(3) Status Document
- VII. Conflict of Interest Code
- VIII. Organizational Chart / Job Descriptions
- IX. Salary Schedule
- X. Budget
- XI. Audit Report
- XII. Student/Parent Handbook
- XIII. Student Enrollment Application

A. EDUCATIONAL PHILOSOPHY AND PROGRAM

“A description of the educational program of the school designed, among other things, to identify those pupils whom the school is attempting to educate, what it means to be an ‘educated person’ in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.”

-California Education Code section 47605.6(b)(5)(A)(i)

Mission

To graduate high achieving students of good character prepared for college and citizenship in a democratic society.

Educational Philosophy

An Educated Person in the 21st Century

Being an educated person in the 21st Century means to have a high level of academic mastery as well as critical thinking and problem-solving skills that will provide opportunities and preparation for college and career. Fortune School promotes students with the highest levels of academic achievement and character. These academic and life skills give students the tools to meet the educational, professional and personal challenges of the 21st century.

How Learning Best Occurs

Fortune School adheres to the Five Pillars originally developed by KIPP (Knowledge Is Power Program). The Five Pillars guide the operation of Fortune School and serve as the values by which administrators, faculty and staff serve and interact with scholars. The Five Pillars are the framework for the innovative program design that distinguishes Fortune School from other schools in the region. In its first four years of operation, Fortune School has proved that our model gets results with our scholars having earned an 807 in 2013 on the Academic Performance Index (API), exceeding the state goal of an 800 API.

Fortune School’s Five Pillars

1. **High Expectations** – We have high expectations for academic achievement and conduct that are clearly designed, measurable and make no excuses based on the on the background of the students. Students, parents, teachers and staff create and reinforce a culture of achievement and support.
2. **Choice and Commitment** – Students, their parents and staff choose to participate in the program. Everyone must make and uphold a commitment to the school and to each other to put in the time and effort required for success.
3. **More Time** – We know that there are no shortcuts when it comes to success in academics and life. With an extended school day, week and year; students, teachers, school leaders, parents and staff dedicate more time. This ensures that students acquire the knowledge and skills that prepare them for competitive colleges, as well as opportunities to engage in diverse extracurricular activities.
4. **Focus on Results** – We focus relentlessly on high student performance through standardized tests and other objective measures. Just as there are no shortcuts, there are

no exceptions. Students are expected to achieve a level of academic performance that will enable them to succeed in the nation's best colleges and the world beyond.

5. **Citizenship** - We strongly believe that the measure of a person's success is in what he or she gives to others. Through community service, students develop a strong sense of civic responsibility and establish the foundation for a lifetime of meaningful community involvement. Students also deepen and demonstrate their learning and are empowered to become productive citizens in the community in which they live.

Students to be Served

In 2011, the Sacramento County Board of Education approved Fortune School to open nine public charter schools (a school a year during the term of the charter) designed to close the achievement gap for the Sacramento region's lowest performing subgroup—African American students. As a part of the Board's action to approve Fortune School, the Sacramento County Board of Education made findings of fact that there was a severe and persistent African American achievement gap in the county that was well-documented based on student achievement data from the California Department of Education. As found in the Findings of Fact from the February 1, 2011 Board Agenda Item VIII.D. (**Appendix I**):

B. Required Findings

- Education Code Section 47605.6(a)(1) states that a county board of education may only approve a countywide charter if it finds that the charter school will offer educational services to a pupil population that will benefit from those services, and that cannot be served as well by a charter school that operates in only one school district in the county. Education Code Section 47605.6(b) provides that SCBE may grant a countywide charter only if it is satisfied that the granting of the charter is consistent with sound educational practice, and that the charter school has a reasonable justification for why it could not be established by petition to a school district.
 - The Fortune petition sets a goal of eliminating the achievement gap for the Sacramento region's lowest performing subgroup by increasing the availability of a rigorous, college preparatory, Pre-K-12 program for African American students throughout the county. The petition notes that this achievement gap exists for African American students across Sacramento County and in each of the county's school districts. Fortune is modeling its educational program after that of PS7. It presents evidence that PS7 has eliminated this achievement gap, with African American students who attend PS7 surpassing White student performance in the county in both English Language Arts and mathematics. Fortune reports that in February, 2010, 100 percent of the PS7 students who entered St. HOPE's Sacramento High School passed both the English Language Arts and mathematics portions of the California High School Exit Exam and that PS7 has demonstrated significantly higher student performance than public schools serving similar populations. Thus, the educational program being proposed has a demonstrated record of success for this student population.

- Fortune proposes to make the PS7 model widely available to underserved African American students throughout Sacramento County, and contends that because of the pervasive nature of the African American achievement gap across the county and in all of the districts where the charter school intends to operate, these students could not be served as well by a charter school that operates in only one district. This is the petition's justification for establishing a system of schools across the county rather than petitioning a single school district.
- In its January 20, 2011 submission, Fortune argues the following in support of the required legal findings noted above:
 - The large geographic area of the county and the difficulty of commuting the target population from all over the county to a single location in a single district;
 - The increased efficiencies of operating one charter rather than charters in several districts;
 - The benefit of the SCBE control in strategically locating high quality programs where they are most needed in the county;
 - The ability of the SCBE to dictate much higher levels of academic accountability (as compared to district approved charter schools) for each countywide charter school location;
 - The easier ability to finance and acquire facilities as a single countywide charter;
 - Local school districts' lack of expertise in closing the achievement gap and SCOE's greater expertise in this area;
 - Fortune's founding vision to have a system of schools in multiple school districts across the county to address a countywide problem would not be possible by individual district-sponsored charters;
 - Requiring Fortune to first petition each district would nullify the purpose of the countywide charter statute.
- Based upon Petitioner's intended goal and the data provided, SCBE could reasonably make the required finding under Education Code Section 47605.6(a)(1) that the educational services to be provided by the charter school will offer services to a pupil population that will benefit from those services and that cannot be served as well by a charter school that operates in only one school district in the county.

True to our commitment, Fortune School has provided a regional solution to a regional problem by increasing the availability of rigorous, college preparatory, public school programs to African American students throughout the county. During the term of its original charter petition (2011-2016), Fortune opened five schools in communities throughout Sacramento County including South Sacramento, Oak Park, Elk Grove and South Natomas. In this way, Fortune met its commitment to opening a school year in the first five years of the charter.

School Name Location, Year Open	Grade Levels	2015-2016 Enrollment
Fortune School South Sacramento, Opened 2011	K-5	345
William Lee College Prep Oak Park, Opened 2012	K-5	320
Alan Rowe College Prep Elk Grove, Opened 2013	K-5	322
Ephraim Williams College Prep Middle School Oak Park, Opened 2014	6-7	90
Hazel Mahone College Prep South Natomas, Opened 2015	TK-2	119
Total		1,196

While the focus on Fortune School is to solve the persistent and pervasive underachievement of African American students in Sacramento County, Fortune School is open to all students. Fortune School serves a diverse student population. Student enrollment at Fortune School in the 2014-15 school year was 61% African American, 23% Latino, and 10% Mixed Race (see table below). Fortune School does not discriminate against any students on any basis including, but not limited to: race, color, religion, gender, national origin, physical or mental disability, or any other protected class under federal, state or local law. Fortune School targets students and families living in Sacramento County, however, consistent with charter school law, enrollment is open to all students in the state.

2014-2015 Fortune School Enrollment by Ethnicity

Ethnicity	Number (Percentage)
African American	547 (61%)
Latino	204 (23%)
Two or More Races not Hispanic	86 (10%)
Asian	26 (3%)
White	14 (2%)
Pacific Islander	7 (.7%)
American Indian or Alaskan Native	6 (.7%)
Filipino	5 (.6%)
Not Reported	3 (.3%)
Total	898

Source: California Department of Education Dataquest. Figures do not add up to 100% because numbers are rounded.

Fortune School's growth plan continues to be nine public charter schools at scale in Sacramento County. The configuration of these schools, however has changed to meet the needs of Fortune School's existing student population. Fortune School's new growth plan is as follows:

- o 3 K-5 campuses
- o 1 TK-5 campus

- o 1 TK-8 campus
- o 3 Middle School campuses, grades 6-8
- o 1 High School campus, grades 9-12

Fortune School has four additional campuses to open to reach its goal of nine schools. Two new schools will open during the term of this charter renewal. The other two will open during the next renewal period (1 K-5, 1 middle school), unless demand requires an earlier school opening during the term of the first renewal.

During the term of the renewal (2016-17 through 2020-21), Fortune School will open a middle school and high school, both in Elk Grove. We intend to open these additional campuses in the 2017-18 school year to accommodate growth caused by existing students advancing to higher grade levels in middle school and high school.

As such, Fortune School will grow from 5 schools in 2015-16 with 1,196 students to 7 schools in Sacramento County during the term of the charter renewal (2016-17 to 2020-21), adding an additional 1,119 seats for a total enrollment of 2,315. During the term of the charter, our school sites will be:

School	Grade Levels	Enrollment by 2020-2021 School Year
Fortune School	K-5	300
William Lee College Prep	K-5	300
Alan Rowe College Prep	TK-5	320
Hazel Mahone College Prep	TK-7	395
Ephraim Williams College Prep Middle School	6-8	150
New Middle School	6-8	400
Early College High School	9-12	450
Total Enrollment	K-12	2,315

School	2016-17	2017-18	2018-19	2019-20	2020-21
Fortune School (K-5)	350	325	300	300	300
William Lee College Prep (K-5)	325	350	350	325	300

Alan Rowe College Prep (TK-5)	350	325	350	345	320
Hazel Mahone College Prep (K-7)	195	245	295	345	395
Ephraim Williams College Prep Middle School (6-8)	150	150	150	150	150
New Middle School (6-8)	-	125	225	350	400
Early College High School (9-12)	-	100	200	300	450
Total	1,370	1,620	1,870	2,115	2,315

Reflections on Past Charter Term

Fortune School has obtained the state goal for schools of an 800 on the Academic Performance Index (API), having earned an 807 API in 2013, the latest year for which state data on the API is available. In the initial charter petition, Fortune School set a goal to reach an 800 API within 5 years. Fortune School exceeded this goal having maintained an API over 800 since its first year in operation.

Fortune School Academic Performance Index (API) Scores*

	2012	2013
LEA-wide	879	807
African American	869	801
Latino	919	825
English Learners	-	837

Source: California Department of Education Dataquest

*2013 is the latest year for which an API is available. The California Legislature suspended the API in 2014 and 2015.

Fortune School has met its performance objectives while serving a largely low-income, African American student population, a third of whom are African American boys. African American students continue to be the lowest performing ethnic subgroup in the districts that Fortune School students would otherwise attend. In the school districts that represent 95 percent of African American student enrollment in Sacramento County, African American students perform below English Language Learners and every ethnic subgroup. The only students who African Americans out-perform in these districts are students with special needs. The districts include: Elk Grove Unified, Sacramento City Unified, Twin Rivers Unified, San Juan Unified, Natomas Unified, Folsom-Cordova Unified, and Robla Elementary.

As illustrated in the table below, there remains a severe and persistent African American achievement gap in the county, however, during the term of the charter, African American students at Fortune School outperformed their African American peers in comparison school districts and made gains on closing the achievement gap with white students. This is the rationale for Fortune School as a countywide benefit charter to make a high quality educational program that is achieving positive results available to African American students across Sacramento County. By design, the Fortune School

system operates across districts and could not serve pupils as well in any one district because of the countywide nature of the African American achievement gap.

Fortune School African American Students Outperform Peers in Comparison School Districts and Make Gains Closing Achievement Gap with White Students

District	2014-2015 African American Student Enrollment	% of County African American Student Enrollment	African American API 2013	White API 2013	Gap	2014-2015 % Students Socio-Economically Disadvantaged
Elk Grove Unified	8,824	29%	712	831	-119	56%
Sacramento City Unified	8,103	26%	677	831	-154	68%
Twin Rivers Unified	4,511	15%	668	764	-96	84%
San Juan Unified	3,805	12%	671	808	-137	51%
Natomas Unified	2,397	8%	716	859	-143	52%
Folsom-Cordova Unified	1,312	4%	709	860	-151	34%
Fortune School	547	2%	801	-		82%
Center Joint Unified	452	1%	758	814	-56	60%
Robla Elementary	361	1%	711	793	-82	90%
Total	30,312	98%	707 State	852 State	-145	59%
County African American Enrollment	30,840					

2014-2015 Fortune School Enrollment by Ethnicity

Ethnicity	Number (Percentage)*
African American	547 (61%)
Latino	204 (23%)
Two or More Races not Hispanic	86 (10%)
Asian	26 (3%)
White	14 (2%)
Pacific Islander	7 (.7%)
American Indian or Alaskan Native	6 (.7%)
Filipino	5 (.6%)
Not Reported	3 (.3%)
Total	898

Source: California Department of Education Dataquest

Percentage of African American Boys Attending Fortune School v. Sacramento County

2014-2015	Fortune School	Sacramento County
African American Boys	271 (30%)	15,974 (13%)

Source: California Department of Education Dataquest

2014-2015 Fortune School Free/Reduced Lunch, Special Education, English Learner Enrollment

Economically Disadvantaged	Special Education	English Learners
733 (82%)	84 (9%)	72 (8%)

Source: California Department of Education Dataquest

Curriculum and Instructional Design

As explained in an earlier section, Fortune School believes in the Five Pillars. The Five Pillars are our education philosophy. Fortune School operates site-based programs with an instructional model based on a highly disciplined school culture and direct instruction leading to small group, differentiated instruction. Our approach is to implement standards-aligned instructional materials with fidelity. We follow the assessment and curriculum pacing calendar in the instructional materials. Since the implementation of Common Core State Standards our instructional model has evolved to emphasize more student-centered classrooms that are characterized by the use of ratio strategies, centers and blended learning using Chromebooks. We consider following our instructional materials in a disciplined fashion a part of our commitment to High Expectations (Pillar #1). Our overall goal is to prepare each of our scholars to be competitively eligible for a four-year college or university.

The California State Board of Education has adopted or is in the process of adopting new standards for the core disciplines (English/Language Arts, Mathematics, History/Social Science, and Science.) Fortune School will ensure that scholars demonstrate mastery of these standards, including the Common Core State Standards for Math and ELA and the *Next Generation Science Standards for California Public Schools, Kindergarten through Grade 12*. Fortune teachers clearly articulate and post the standards in each classroom and integrate the standards into all lesson plans and classroom activities.

As the California State Board of Education has shifted from the previous set of content standards to the Common Core State Standards (CCSS), Fortune School has been proactive in making the same shift. To do this, Fortune School:

- Adopted new curriculum materials from Houghton Mifflin Harcourt in ELA and Math (listed in Table I: Core Instructional Materials for K-12),
- Purchased Chromebooks for the implementation of blended learning and assessments,
- Provide ongoing outreach to parents to increase understanding of the Common Core State Standards and the Smarter Balanced Assessment Consortium (SBAC) Assessment of ELA and Math.

Fortune School has also addressed the shift to the California Adopted Common Core State Standards by providing teachers with ongoing, intensive professional development and extended planning time to implement the use of the new curriculum, Chromebooks, and instructional strategies aligned to the Common Core State Standards.

Table I: Core Instructional Materials for K-12

Subject	Curriculum
English Language Arts/English Language Development	Houghton Mifflin Harcourt Journeys Common Core 2014 (K-5) Houghton Mifflin Harcourt Collections Common Core 2014 (6-8) *Grades 9-12: we will adopt new instructional materials that are aligned to the Common Core State Standards for English.
Mathematics	Houghton Mifflin Harcourt Go Math! California Edition Common Core 2015 (K-8) *Grades 9-12: we will adopt new instructional materials that are aligned to the Common Core State Standards for mathematics.
Science	Harcourt Science 2006 (K-5) Holt Science 2006 (6-8) *Grades 9-12: we will adopt new instructional materials that are aligned to the Next Generation Science Standards.
Social Studies	Harcourt Social Studies 2005 (K-5) Holt Social Studies 2005 (6-8) * 9-12: instructional materials will be determined by faculty in college-level coursework and aligned to the Content Standards in high school coursework.

Early College High School

Fortune School has created a partnership with Cosumnes River College and Cal Poly San Luis Obispo to open a STEAM focused Early College High School, starting with 9th grade in Fall, 2017. Early College High Schools are innovative partnerships between charter or non-charter public secondary

schools and a local community college, the CSU, or the UC that allow pupils to earn a high school diploma and up to two years of college credit in four years or less. Early College High Schools are small autonomous schools that blend high school and college into a coherent educational program. In Early College High Schools pupils begin taking college courses as soon as they demonstrate readiness and the college credit earned may be applied toward completing an associate or bachelor’s degree, transfer to a four-year university, or obtaining a skills certificate. (Education Code 11302)

Fortune’s Early College High School will focus on providing scholars with STEM education combined with Arts education (STEAM) in order to position graduates to provide innovation leadership to the Sacramento region essential to the new economy. 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 associate's degree while meeting the a-g requirements for transfer to the University of California and California State University. Fortune School will seek approval of its high school courses from the University of California in order to meet the a-g requirements. College coursework from Cosumnes River College already meets the a-g requirements. Fortune School will seek accreditation of the Early College High School Program by the Western Association of Schools and Colleges in order for courses to be considered transferrable by other public high schools.

The primary partnership to provide the Early College High School is between Fortune School and Cosumnes River College. Cal Poly San Luis Obispo’s role in the partnership is to provide hands-on, STEM related extracurricular activities for Fortune School scholars. For example, Cal Poly San Luis Obispo has committed to provide 10 free slots for Fortune School students to participate in EPIC (Engineering Possibilities in College) through the campus’ College of Engineering. The College of Engineering’s mission is “to educate students for careers of service, leadership and distinction in engineering or other fields by using a Learn by Doing, hands-on approach.” As one of the college’s outreach programs, EPIC residential summer camp endeavors to extend this mission to grades 7-12.

The course scope and sequence for the Early College High School is below. Courses that include a catalog number will be taught by Cosumnes River College faculty. The remaining course will be taught by Fortune’s high school teachers. Fortune School will supplement the college coursework for Common Core alignment in subjects for which there are state assessments. In addition, Fortune School will provide scholars with academic support in college coursework. Support may include strategies such as blended learning, academic support seminars, and tutoring labs.

9th Grade	Semester 1	Semester 2	Summer
ELA/ELD (4 Years)	English 9	English 9	
Math (3 Years)	Algebra I	Beg. Algebra (Math 100)	
Social Studies (3 Years)	U.S. History	U.S. History	
Science (3 Years w/ Lab)	Earth and Physical Science	Earth and Physical Science	
Foreign Language (3 Years Rec.)	X	X	
Visual and Performing Arts (1 Year)	ARTH 300: Introduction to Art	MUFHL 321: Basic Musicianship	
Physical Education (2 Years)	P.E. 9	P.E. 9	

Electives (1 Year)	INDIS 313: Freshman Seminar	HUM 300: Classical Humanities	
10th Grade	Semester 1	Semester 2	Summer
ELA/ELD	English 10	English 10	*COMM 301: Introduction to Public Speaking
Math	MATH 120: Intermediate Algebra	Geometry	
Social Studies	Geography	World History	
Science	BIOL 300: Foundations of Biology	CHEM 300 (L): Beginning Chemistry with Lab	
Foreign Language	Spanish I	Spanish I	
Visual and Performing Arts	X	X	
Physical Education	P.E. 10 (includes health and family life education)	PACT 310: Badminton I or another college PE course	
Electives	*COMM 301: Introduction to Public Speaking	Driver's Education	
11th Grade	Semester 1	Semester 2	Summer
ELA/ELD	English 11	English 11	Remedial ELA if necessary. ENGWR101: College Writing
Math	Geometry	MATH 335: Trigonometry with College Algebra	
Social Studies	Economics	POLS 301: Introduction to Gov't United States	
Science	CHEM 400 (L): General Chemistry	CHEM 401 (L): General Chemistry	
Foreign Language	Spanish 2	Spanish 2	
Visual and Performing Arts	X	X	
Physical Education	X	X	
Electives			
12th Grade	Semester 1	Semester 2	Summer
ELA/ELD	ENGWR 300: College Composition	ENGWR 301: College Composition & Literature	
Math	MATH 350: Calculus for the Life & Social Sciences <u>OR</u> MATH 370: Pre-Calculus Mathematics	MATH 351: Calculus for the Life & Social Sciences 2 <u>OR</u> MATH 400: Calculus I	
Social Studies	HIST 320: History of the United States African American Emphasis James Town - Civil War	HIST 321: History of the United States African American Emphasis Reconstruction - Present	

Science	BIO 400 (L): Principals of Biology	PHYS 350: General Physics (Optional)	
Foreign Language	SPAN 402: Elementary Spanish (Optional)		
Visual and Performing Arts	X	X	
Physical Education	X	X	
Electives			

Partnering with University College Action Network (UCAN) for Career Pathways and College Admissions and Prep Program

Fortune’s counselor will be responsible for advising parents about the transferability of courses to other public high schools and whether each individual course offered by the charter school meets college entrance requirements. As an Early College High School, the course scope and sequence that Fortune has developed with Cosumnes River College is designed to meet the a-g requirement for eligibility to the CSU and UC systems. The Cosumnes River College courses already meet the requirements for transfer. Fortune will have to get its courses provided by high school teachers approved by the University of California.

Fortune School will partner with the University College Action Network (UCAN) to provide the Career/College Admission and Prep Program (C-CAP Program) in order to provide scholars with career pathways and college admissions programming. UCAN will work in collaboration with Fortune’s counselor to ensure a robust and meaningful program.

Through the C-CAP Program scholars in grades 9 and 10 will focus on the results of a thorough career path assessment. Students gain self-awareness on interests, skills, and work values; career exploration and tentative choices that support the selection of classes during the early years of high school. This valuable work provides the needed basis for college preparation and the selection of post-secondary majors of study. The C-CAP Program in grades 11 and 12 focuses on the following college prep areas:

- Preparing and maintaining good academic standing throughout the college application process;
- Finding money for college (researching, selecting and applying for scholarships),
- Writing effective college essays and soliciting strong letters of recommendation; evaluating offers and opportunities;
- Quarterly monitoring of student high school academic status;
- On-going communication with parents/guardians; and
- 24-hour U-CAN support for families during and after the college application/admission process.

Data Driven Instruction

Fortune School Teachers Focus on Results (Pillar #4) by using data to drive instruction. Teachers assess students weekly and provide their principals and grade level partners with weekly data and reflections to identify what strategies they will use to improve student achievement. Planning for

continuous improvement in student academic achievement is the focus of weekly grade-level collaboration time for teachers during Fortune's Early Release Wednesdays.

Instructional Time & Academic Schedule

Teaching and learning at a Fortune School is a choice that faculty, students, staff and parents make voluntarily. It requires an extraordinary commitment of time, patience and hard work. That's why we emphasize that Choice and Commitment (Pillar #2) is the mindset required to succeed in the Fortune Model. For example, Fortune scholars have a longer school day and a longer school year, giving them More Time (Pillar #3) to master academic content. We have a modified-year round schedule in which scholars attend school in three trimesters. In between trimesters, Fortune School holds an Intersession program for students who are not yet learning at grade level in ELA and Math. During Intersession, scholars work in small groups with their teachers to master standards that they have missed. See **Appendix 2** for the bell schedule and **Appendix 3** for the academic calendar.

School Culture

More Time (Pillar #3) also applies to instructional time that Fortune teachers devote to teaching our scholars the school culture. Teachers spend the first ten days of school teaching school culture, which covers expectations for student behavior as well as the routines and procedures a Fortune School scholar is expected to know. Teachers revisit these expectations after every break when students return to school. We call this practice Setting the Tone for Learning and it is a fundamental part of the Fortune Model. Teachers participate in professional development to learn how to Set the Tone for Learning. We monitor teacher effectiveness in this area using an observation instrument. Our approach is to teach scholars everything and assume nothing. For example, we teach scholars how to walk in the hallways using a procedure called HALL; how to sit-up, listen and ask questions through a procedure called SLANT and how to use hand signals to ask basic questions like "may I sharpen my pencil?"

Character Education

Citizenship is Pillar #5. We teach our scholars to be good citizens using Kohlberg's Six Levels and Character Counts. Kohlberg was a moral philosopher and student of child development. He was director of Harvard's Center for Moral Education. His special area of interest was the moral development of children--how they develop a sense of right, wrong and justice. Kohlberg observed that growing children advance through definite stages of moral development. His observations and testing of children and adults led him to theorize that human beings progress consecutively, in stages.

Kohlberg's Six Stages of Moral Development

Level 1: We do the right thing because we don't want to get in trouble.

Level 2: We do the right thing because there's a reward.

Level 3: We do the right thing because we want to impress someone.

Level 4: We do the right thing because we want to follow the rules and keep the peace.

Level 5: We do the right thing because we care about the rights and feelings of others.

Level 6: We do the right thing because it's who we are.

Kohlberg's Six Stages of Moral Development are posted in all Fortune School classrooms and are taught in-depth during culture building in the first ten days of school and after scholars return from each trimester break. Teachers and principals make ongoing reference to Kohlberg's with scholars throughout the program to foster scholars' moral development.

Character Counts is an educational framework for teaching values represented in Six Pillars of Character — trustworthiness, respect, responsibility, fairness, caring, and citizenship. Fortune School teachers instruct scholars on the Six Pillars of Character giving recognition to scholars who exemplify the character traits.

Positive Behavior Management

Student behavior is monitored and supported in various ways including:

- Classroom Dojo - classroom management platform for teachers where each student has an avatar that gains and loses points according to their behavior in class and in the hallways; makes reports to parents in real time through an app.
- Deans of Students who are certified behavior analysts/specialist implement student behavior expectations published in Fortune School's student handbook and provide social skills classes and individual behavior plans for students who need extra support.
- Campus Monitors who are trained through the El Dorado County Charter School SELPA on positive behavior management and Nonviolent Crisis Prevention Intervention supervise Fortune School scholars at lunch, recess, physical education and in the hallways.

Community Service

In addition, scholars are expected to participate in a class community service project each trimester. Participation in the class community service project is a requirement for Honor Roll along with academic expectations. This focus on a school-wide culture of High Expectations (Pillar #1) and Citizenship (Pillar #5) is a distinguishing feature of Fortune School campuses.

Teaching Methods & Instructional Strategies

Fortune School gives students opportunities to learn academic and life skills from teachers, parents, classmates, and caring community members. The instructional strategies employed at Fortune School are described below. These strategies apply to all students, including English Language Learners and students with special needs. Following the description of Fortune School's instructional strategies, we provide a chart explaining how Fortune School uses Response to Instruction and Intervention to ensure that every student receives developmentally appropriate, individual instruction that leads to standards mastery.

Ratio

Ratio is the collection of teaching techniques that ensures students are doing as much of the "heavy lifting" as possible --thinking, talking, writing and analyzing-- as soon as they are ready. The idea is to increase the ratio of student talk to teacher talk, a key strategy under Common Core State Standards. Ratio includes techniques such as Turn & Talk, Everybody Writes, Cold Call and Call & Response. Fortune School uses Doug Lemov's explanation of ratio in *Teach Like a Champion 2.0 (2014)* in its teacher professional development.

Differentiated Instruction

All too often, teachers “teach to the middle”, meaning instruction is geared toward the mid-range of academic levels in the classroom. This severely hampers students who are struggling and those who are excelling. In order to maximize the learning opportunities and achievement for all students, Fortune School will utilize a variety of differentiated instructional strategies. Specifically, instruction at Fortune School will be delivered through a variety of modalities (auditory, visual, multi-media, “hands-on”) and flexible grouping strategies (whole class, cooperative groups, project-based learning). In addition, all teachers will collect, analyze and reflect upon student achievement data on a weekly basis to guide instruction and ensure that all students’ needs are being met.

Learning Centers

A learning center is a self-contained section of the classroom in which students engage in independent and self-directed learning activities. Centers give teachers the opportunity to focus on specific areas of study. Fortune School teachers use centers as a strategy in English/Language Arts and math to differentiate instruction for students. Students work independently at centers, allowing the teacher to work one-on-one or in small groups with students who need individual attention.

Blended Learning

Blended Learning is a formal education program in which a student learns at least in part through delivery of content and instruction via digital and online media with some element of student control over time, place, path, or pace. Fortune School teachers incorporate blended learning into their centers using a rotation model. Fortune School provides students with Chromebooks at a 2:1 ratio in grades 3 and higher and a 3:1 ratio in grades K-2. Fortune School teachers use online learning programs in centers to allow for an individualized, self-paced, student learning experience using:

- Online content from our adopted Common Core-aligned instructional materials for ELA and math (Journeys, Go Math! and Collections);
- Reading Eggs: engaging online program that offers a variety of teaching resources and student activities for pre-K through 6th grade language arts and math;
- EducationCity: online program designed to engage and inspire students through creative new methods of delivering curriculum content;
- Study Island: data-driven standards mastery and formative assessment solutions designed to help K–12 students master the content specified Common Core standards and improve performance in core skill areas.

Extended Day and Year

Fortune School serves a population of students who often come to school far below grade level and without the foundational academic skills necessary to thrive in an environment of high standards. A core principle of Fortune School is “More Time”, understanding that students will often need this time in order to efficiently reach grade level proficiency. Fortune School has a modified year-round academic calendar (**Appendix 3**), which has been shown to be more conducive to students’ retention of academic information and skills. Students who are not making progress towards grade level standards attend Intersession programs in the Fall, Spring and Summer. In addition, students have a longer school day with a built-in study hall at the end of the day to receive assistance on their homework from their classroom teacher. See the bell schedule in **Appendix 2**.

Field Lessons

Field lessons are an important opportunity for students to receive direct experiences beyond the text and classroom discussions. Field lessons are always an extension of standards-based classroom learning. Field lessons provide a rich, in-depth experience with the outside world that cannot be provided by just classroom activities. Certain field lessons are a common part of the Fortune School experience for a scholar:

- Each scholar in grades K-12 visits a 4-year university annually.
- 5th grade scholars at Fortune School take a field lesson to the Cal Poly San Luis Obispo Learn by Doing Science Lab to focus on science standards that their classroom teachers identify as a priority.
- 6th grade scholars attend a field lesson to the Sly Park Environmental Education Center which provides up to a week-long outdoor science learning experience.
- 8th grade scholars attend a week-long field lesson to Washington, DC. This trip takes place outside of the academic schedule, and is voluntary.

Advisory Groups aka Business Breakfast, Freshman through Senior Seminars

Beginning in middle school, Fortune School scholars are assigned to a homeroom advisory teacher. They meet every morning for what Fortune School calls a “Business Breakfast.” Each advisory is named after a college or university. Advisory teachers are advocates for their scholars and the primary contact for parents. When Fortune School scholars reach the high school level, they will have a daily Morning Meeting as a social and emotional check-in. In addition, high school scholars will attend a Freshman, Sophomore, Junior and Senior Seminar for the purpose of academic advising and team building.

Plan for how the charter will identify and respond to the needs of pupils who are:

- **Not achieving at or above expected levels**
- **Achieving substantially above or below grade level expectations**

Through Fortune School’s Response to Instruction and Intervention (RTI²) program, teachers use data from formative and summative assessments to assign students to tiers in which students receive targeted, individualized, instruction. Below are descriptions of the tiers and the supports Fortune School provides. It is important to note that these tiers are fluid and the intent is that students move at least one, if not two, tiers above their current classification over the course of the year.

Definitions of Terms Used in RTI² Chart

Response to Intervention and Instruction - A multi-tiered approach to the early identification of and support of all students’ learning needs.

Tier Descriptors¹

Exceeded Standard - The student demonstrates advanced progress toward mastery of the knowledge and skills in mathematics/ELA and Literacy needed for likely success in future coursework.

¹ These descriptors draw from the Smarter Balanced Assessment Consortium’s (SBAC) Achievement Level Descriptors.

Met Standard - The student demonstrates progress toward mastery of the knowledge and skills in mathematics/ELA and Literacy needed for likely success in future coursework.

Nearly Met Standard - The student may require further development to demonstrate the knowledge and skills in mathematics/ELA and literacy needed for likely success in future coursework.

Not Meeting Standard - The student needs substantial improvement to demonstrate the knowledge and skills in mathematics/ELA and Literacy needed for likely success in future coursework.

RTI² Chart

Tier	Curriculum Support	Teacher Support
<p>Exceeded Standard (Advanced 90-100%) Tier I</p>	<ul style="list-style-type: none"> ● Modified (on-grade-level) Assignments to go deeper into a standard. ● Rigorous on-grade-level activities to promote critical thinking. ● Extended projects. ● Curriculum Resources for ELA/ELD in Journeys (K-5); Collections (6-8) <ul style="list-style-type: none"> -Advanced Readers -Research-Based Core Instruction -Built on Common Core State Standards -Includes Scaffolds for Reading Complex Text -Includes Differentiated Instruction ● Curriculum Resources in Go Math! <ul style="list-style-type: none"> -Advance Learners Activity -Enrich Book -Extend the Project -HMH Mega Math -iTools 	<ul style="list-style-type: none"> ● Small group instruction and/ or independent study with like peers to extend learning in on-grade-level material. ● Targeted enrichment activities to enhance student strengths. ● Accelerated rate of introducing on-grade-level material. ● Potential work in the next grade level learning objectives. ● Greater flexibility and independence with teacher-provided material.
<p>Met Standard (Benchmark 80% and above) Tier I</p>	<ul style="list-style-type: none"> ● Core curriculum materials that maintain students learning on-grade-level objectives. ● Flexible assignments and activities that are both challenging and satisfying in students' grade level. ● Beginning independent practice. ● Curriculum Resources in Journeys for ELA/ELD (K-5); Collections (6-8) <ul style="list-style-type: none"> -On-Level Readers -Research-Based Core Instruction -Built on Common Core State Standards -Includes Scaffolds for Reading Complex Text -Includes Differentiated Instruction ● Curriculum Resources in Go Math! <ul style="list-style-type: none"> -Standards Practice Book -HMH Mega Math 	<ul style="list-style-type: none"> ● Small group instruction with like peers to clarify concepts and skills early in order to maintain on-grade-level progress. ● Targeted on-grade-level activities to promote depth of knowledge.

	-iTools	
Nearly Met Standard (Strategic 70-79%) Tier 2	<ul style="list-style-type: none"> • Embedded materials to support students up to one grade level below the student's current grade level. • Flexible assignments and activities that are both challenging and sensitive to a student's academic gaps in their grade level. • Leveled tests/assessments. • Curriculum Resources in ELA/ELD <ul style="list-style-type: none"> -Research-Based Strategic Intervention -Extra Support for Common Core State Standards -Accessible Text to Build Student Independence -Leveled Readers for Struggling Readers <ul style="list-style-type: none"> • Curriculum Resources in Go Math! -Strategic Intervention Guide -Intensive Intervention Guide -Personal Math Trainer 	<ul style="list-style-type: none"> • Small group instruction with like peers to review concepts and skills for on-grade-level material. • Alternative teaching strategies that target specific learning styles to fill gaps in learning and to support students building on-grade-level skills and knowledge. • Decelerated rate of introducing on-grade-level material. • Academic Intersession with classroom teacher for small group instruction focused on key standards.
Not Meeting Standard (Intensive 69% and below) Tier 3	<ul style="list-style-type: none"> • Embedded materials for students up to two grade levels below the student's current grade level. • Flexible assignments and activities that are sensitive to a student's academic gaps in the current grade level prerequisites. • Leveled tests/ assessments. • Curriculum Resources in ELA/ELD in Journeys (K-5); Collections (6-8) <ul style="list-style-type: none"> -Reading Tool Kit Intensive intervention for students far below level -Intensive intervention begins at first grade • Curriculum Resources in Go Math! <ul style="list-style-type: none"> -Strategic Intervention Guide -Intensive Intervention Guide -Personal Math Trainer 	<ul style="list-style-type: none"> • Small group instruction with an instructional aide to build foundational skills for on-grade-level material. • Alternative teaching strategies that target specific learning styles to fill gaps in learning and to support students building on-grade-level skills and knowledge. • Decelerated rate of introducing on-grade-level material. • Referencing and instructing in previous years' grade level learning objectives. • Academic Intersession for small group instruction focused on key standards with classroom teacher.

Educator Professional Development

Providing teachers and school leaders with the ongoing professional development, coaching and planning time they need to be successful in implementing our instructional program to fidelity is a part of the Fortune Model. Fortune provides professional development through our Curriculum and Instruction Department as well as credential and master's degree programs through Fortune School of Education. A teacher in the Fortune School system can expect to:

- Participate in a Summer and Spring Symposium, all staff multiple-day conferences focused on Fortune School 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 lessons; and
- Have the opportunity to advance to school leadership through our School Leadership Program through Fortune School of Education.

Some Fortune School teachers learn the Fortune Model in depth by earning their teaching credential through Fortune School of Education and completing a teaching residency at a Fortune School. Fortune School provides a career path for educators by developing its principals internally through its School Leadership Program. The program leads to an Administrative Services Credential.

Plan for English Learners

English Learners (EL) will also participate in the Fortune School core curriculum, with strategic support focused on English Language Development (ELD). In addition to the core program, the English Language Development component of the curriculum will address four additional elements and require an extra hour of daily English Language Development instruction, as described in the California Reading/Language Arts Framework. English Learner instructional materials include:

- Access to core curriculum through Specially Designed Academic Instruction in English (SDAIE).
- Lessons that address the Beginning, Early Intermediate, Intermediate and Early Advanced levels of English-language proficiency at every grade level.
- Teacher edition and student materials are focused and efficient to ensure English Learners acquire proficiency in English as quickly and effectively as possible.
- Additional ELD instruction for up to 1 hour daily will be given to English Learners.

In addition, Fortune School's standards-based curriculum will also meet the needs of English Learners with an emphasis on academic language, vocabulary and concept development, sentence structure, grammar, organization and delivery of oral communication, and speaking applications. Curriculum materials and professional development training will provide guidance to teachers on how to instruct English Learners to master the English Language Arts content standards so learners can read, write, comprehend, and speak English for personal use and at the proficient level for academic schoolwork. Teacher and student editions assist English Learners in developing proficiency in the English language and the concepts and skills contained in the Common Core State Standards in English Language Arts.

Emphasis is placed on:

- Instruction in the skills that are transferable from students' primary language to English and non-transferable skills
- Acquisition of academic vocabulary
- Phonological, morphological, syntactical, and semantic structures of English

The materials provide explicit, sequential, linguistically logical, and systematic instruction, practice, application and diagnostic support in the following areas:

- Phonemic awareness and phonics
- Word recognition and spelling
- Oral reading fluency
- Vocabulary and morphology
- Grammar and usage
- Listening and reading comprehension
- Sentence structure
- Speaking and Writing

Strategies for English Learner Instruction and Intervention

The curriculum adopted by Fortune School for ELA and math includes embedded instructional materials for English development that provides support for students to allow them to successfully participate in and progress through the daily lessons from the core programs with their peers. For example, in Journeys (K-5) for ELA the curriculum includes:

- ELL Teacher's Handbook
- ELL Leveled Readers
- ELL Level Readers Teacher Guides
- ELL Blackline Masters
- ELL Newcomer Teacher's Guide
- Vocabulary and Concepts Posters
- Newcomer Audio

Fortune School will comply with all applicable state and federal laws in regard to services and the education of English Learner students. Specifically, Fortune School will develop, implement and maintain policies and procedures for EL students in accordance with guidelines published by the Office of Civil Rights of the U.S. Department of Education, State and Federal Court decisions and policies, and California Education Code. These policies and procedures will:

- Ensure outreach to parents of English Learners, provide training and hold regular meetings to inform them how to be involved in the education of their children;
- All school notices and reports translated into home languages;
- Inform parents of English Learners of the placement of their children in English language classrooms, Structured English Immersion classrooms, and notify them of their opportunity to apply for an exception waiver for their children to participate in an alternative program;
- Properly identify English Learners through the Home Language Survey;
- Assess their English language proficiency through the California English Language Development Test (CELDT) or successor exams and benchmark testing of English language proficiency;
- Allocate general funds for core instruction of English Learners, as well as categorical funds for services that supplement the core curriculum;

- Develop in compliance with state criteria and regulations, a program informed by a sound educational theory recognized by experts in the field or deemed a legitimate experimental strategy, and ensure that steps are taken to implement effectively the educational theory adopted by the school;
- Examine the program for English Learners for indications that language barriers confronting students are actually being overcome, and modify the program, if needed;
- Place English Learners in classrooms that enable them to have equal access to the School's educational program, and ensure they receive instruction in English Language Development and the core curriculum;
- Ensure that English Learners are taught by qualified staff, have sufficient curricular materials, and the facilities are in a clean and safe condition;
- Develop appropriate evaluation standards, including program exit criteria, for measuring the progress of students;
- All teachers assigned to provide instruction to English Learners will have the appropriate authorization (CLAD, BCLAD or equivalent).

Reclassification of English Learners

Fortune School has developed a policy and procedures for English Learner (EL) reclassification based on the four criteria set forth in Education Code Section 313(d). The following reclassification guidelines will be used by Fortune School when evaluating a student's readiness for reclassification from English Learner to English proficient (RFEP).

- **Assessment of English Proficiency:** Review of CELDT or successor exam results from annual assessment. Students must score at early advanced or higher overall and score at intermediate or higher in listening and speaking, reading, and writing.
- **Comparison of Performance in Basic Skills:** Review of results of latest benchmark tests in English Language Arts. Fortune School will set the Proficient level on benchmark assessments in English-Language Arts as the minimum for English Learners to be eligible for reclassification.
- **Teacher Evaluation of Student Academic Performance:** Review of student's academic performance. Students must meet academic performance indicators established by Fortune School. Specifically, this would include a grade of 80% or higher on all academic work in English-Language Arts: class work, curriculum-embedded and informal assessments (formative and summative), and homework. Students will be provided opportunities for re-taking assessments or making up any academic work that does not receive an 80% or higher mark.
- **Parent or Guardian Opinion or Consultation:** Fortune School will provide notice to parents and guardians of their rights to participate in the reclassification process. Fortune School will encourage parents or guardians to participate in the reclassification process and attend a face-to-face meeting.
- **Reclassification:** Fortune School will reclassify any student who meets the above criteria as fluent English proficient (RFEP). Parents or guardians will be notified of their student's reclassification, and school records will be updated. Upon reclassification of any English Learner to RFEP, Fortune School will continue to monitor the student's progress for two years.

African American Vernacular English

Fortune School serves a significant number of students who are speakers of African American Vernacular English (AAVE), the linguistic system used by and among many African Americans in everyday life. African American Vernacular English is a term used in the California Curriculum Commission Adoption Criteria. Fortune School curriculum, staff development and instruction is designed to ensure that all children, regardless of social, ethnic, or linguistic background, have the ability to read and write English in ways that lead to academic success. The goal remains that all students will learn standard academic English, without a focus on eliminating AAVE.

Children whose speech follow these rules are helped to learn standard academic English by receiving special practice at just those points where their language differs from standard. While there are numerous patterns that are unique to AAVE, Fortune School instruction concentrates on those patterns that have the most immediate effect on reading and writing. These patterns include: sounds, pronunciations, consonant clusters, the verb system, the past tense, the possessive system, existential constructions, the plural marking system, and the negative system.

In addition to linguistic patterns and features that impact language and literacy learning for AAVE-speaking children, there are socio-cultural perspectives and attitudes that are taken into consideration. Fortune School supports AAVE-speaking students who exhibit resistance to learning standard academic English by helping students to understand that it is possible to acquire mastery of standard academic English without rejecting the language used by their families and community. Students learn that what is appropriate in one setting is not appropriate in another so that they can shift easily and competently between varieties in different social context. Teachers deliver the message that non-standard varieties are different, rather than inferior. Standard academic English is taught in a way that respects the richness, legitimacy, and vitality of their home language.

Fortune School may elect to conduct a self-review and/or have an outside consultant conduct an annual audit to comply with federal and state guidelines.

Fortune School Results with English Language Learners

2014-2015 Fortune School Free/Reduced Lunch, Special Education, English Learner Enrollment

Economically Disadvantaged	Special Education	English Learners
733 (82%)	84 (9%)	72 (8%)

Fortune School Academic Performance Index (API) Scores*

	2012	2013
LEA-wide	879	807
African American	869	801
Latino	919	825
English Learners	-	837

Source: California Department of Education Dataquest

*2013 is the latest year for which an API is available. The California Legislature suspended the API in 2014 and 2015.

Fortune School Reclassification of English Language Learners

	Percent Reclassified
2013-14	19%
2014-15	25%

Plan for Serving Students with Disabilities

Overview

As of the writing of this document, in the 2015-16 school year, Fortune School serves 112 students with special needs, representing 9.36% of the population. Below, please see a snapshot of our current Special Education population:

SERVICE PROVIDED	NUMBER OF STUDENTS RECEIVING SERVICE	PERCENTAGE OF SPECIAL NEEDS STUDENTS RECEIVING SERVICE
Language and Speech	86	46%
Specialized Academic Instruction	66	35.29%
Occupational Therapy	20	10.7%
Behavior Intervention Services	7	3.74%
Individual Counseling	4	2.14%
Counseling and Guidance	3	1.6%
Psychological Services	1	.53%
TOTAL	187*	100%

*This number is higher than the number of students receiving special services, as some students receive more than one service.

Fortune School will continue to comply with all applicable state and federal laws in serving students with disabilities, including, but not limited to, Section 504 of the Rehabilitation Act (“Section 504”), the Americans with Disabilities Act (“ADA”) and the Individuals with Disabilities in Education Improvement Act (“IDEIA”).

Fortune School is its own local educational agency (“LEA”) and is a member of the El Dorado County Charter Special Education Local Plan Area (“SELPA”) in conformity with Education Code Section 47641(a).

Fortune School will continue to comply with all state and federal laws related to the provision of special education instruction and related services and all SELPA policies and procedures; and shall utilize appropriate SELPA forms. Fortune School is solely responsible for its compliance with Section 504 and the ADA. The facilities to be utilized by Fortune School will continue to be accessible for all students with disabilities.

Section 504 of the Rehabilitation Act

Fortune School recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any program of Fortune School. Any student, who has an objectively identified disability which substantially limits a major life activity including but not limited to learning, is eligible for accommodation by Fortune School.

A 504 team will be assembled by the Principal and shall include the parent/guardian, the student (where appropriate) and other qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and accommodations. The 504 team will review the student's existing records; including academic, social and behavioral records, and is responsible for making a determination as to whether an evaluation for 504 services is appropriate. If the student has already been evaluated under the IDEIA but found ineligible for special education instruction or related services under the IDEIA, those evaluations may be used to help determine eligibility under Section 504. The student evaluation shall be carried out by the 504 team, which will evaluate the nature of the student's disability and the impact upon the student's education. This evaluation will include consideration of any behaviors that interfere with regular participation in the educational program and/or activities. The 504 team may also consider the following information in its evaluation:

- Tests and other evaluation materials that have been validated for the specific purpose for which they are used and are administered by trained personnel.
- Tests and other evaluation materials including those tailored to assess specific areas of educational need, and not merely those which are designed to provide a single general intelligence quotient.
- Tests are selected and administered to ensure that when a test is administered to a student with impaired sensory, manual or speaking skills, the test results accurately reflect the student's aptitude or achievement level, or whatever factor the test purports to measure, rather than reflecting the student's impaired sensory, manual or speaking skills.

The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and notice is given in writing to the parent or guardian of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEIA, a referral for assessment under the IDEIA will be made by the 504 team.

If the student is found by the 504 team to have a disability under Section 504, the 504 team shall be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives a free and appropriate public education ("FAPE"). In developing the 504 Plan, the 504 team shall consider all relevant information utilized during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the school's professional staff. The 504 Plan shall describe the Section 504 disability and any program accommodations, modifications or services that may be necessary.

All 504 team participants, parents, guardians, teachers and any other participants in the student's education, including substitutes and tutors, have a copy of each student's 504 Plan. The site administrator will ensure that teachers include 504 Plans with lesson plans for short-term substitutes and that he/she review the 504 Plan with a long-term substitute. A copy of the 504 Plan shall be maintained in the student's file. Each student's 504 Plan will be reviewed at least once per year to determine the appropriateness of the Plan, needed modifications to the plan, and continued eligibility.

Services for Students under the "IDEIA"

Fortune School will continue to provide special education instruction and related services in accordance with the IDEIA, Education Code requirements, and applicable policies and practices of the SELPA.

Fortune School will continue to provide services for special education students enrolled in Fortune School. Fortune School will continue to follow SELPA policies and procedures, and shall utilize SELPA forms in seeking out and identifying and serving students who may qualify for special education programs and services and for responding to record requests and parent complaints, and maintaining the confidentiality of pupil records.

Fortune School will continue to promptly respond to all county office or SELPA inquiries, to comply with reasonable District or SELPA directives, and to allow the county office or SELPA access to charter school students, staff, facilities, equipment and records as required to fulfill all District obligations under this Agreement or imposed by law.

Staffing

All special education services at Fortune School are delivered by individuals or agencies qualified to provide special education services as required by California's Education Code and the IDEIA. Fortune verifies that all non-public agencies it contracts with have been certified by the California Department of Education. Charter school staff participate in SELPA in-service training relating to special education as appropriate.

Fortune School is responsible for the hiring, training, and employment of site staff necessary to provide special education services to its students, including, without limitation, special education teachers, paraprofessionals, and resource specialists. Fortune School will continue to ensure that all special education staff hired or contracted by Fortune School is qualified pursuant to SELPA policies, as well as meet all legal requirements. Fortune School is responsible for the hiring, training, and employment of itinerant staff necessary to provide special education services to charter school students, including, without limitation, speech therapists, occupational therapists, behavioral therapists, and psychologists.

Notification and Coordination

Fortune School will continue to follow SELPA policies as they apply to all SELPA schools for responding to implementation of special education services. Fortune School will continue to adopt and implement policies relating to all special education issues and referrals as appropriate.

Identification and Referral

Fortune School is responsible for identifying, referring, and working cooperatively in locating charter school students who have or may have exceptional needs that qualify them to receive special education services. Fortune School will continue to implement SELPA policies and procedures to ensure timely identification and referral of students who have, or may have, such exceptional needs. A pupil shall be referred for special education only after the resources of the regular education program have been considered, and where appropriate, utilized.

Fortune School will continue to follow SELPA child-find procedures to identify all students who may require assessment to consider special education eligibility and special education and related services in the case that general education interventions do not provide a free appropriate public education to the student in question.

Student Success Team (SST)

After Fortune School completes the child find procedures, a Student Success Team (SST) meeting will be convened. An SST will include, at a minimum, the parent, school principal, education specialist, general education teacher, and if/when necessary, a board-certified behavior analyst, school psychologist, or designated instructional service provider. The SST process will have three tiers. In Tier I, in addition to the SST meeting, the student will participate in Fortune's RTI Program, and receive 6 weeks of accommodations/modifications in accordance with student needs identified in the SST meeting.

In Tier 2, after the 6-week period from Tier I has elapsed, a follow-up SST meeting will be held for the student to see if the accommodations/modifications established in Tier I have been successful. At this time, accommodations/modifications may be changed. Tier 2 interventions will be implemented for 6 weeks.

Lastly, in Tier 3, after the 6 week period from Tier 2 has elapsed, a follow up SST meeting will be held for the student. If at this time the accommodations/modifications identified in Tiers 1 and 2 need to be enhanced or are insufficient to meet the needs of the student, the SST will discuss and implement an assessment plan to be signed by the parent/guardian for the student to be evaluated for Special Education Services (Individual Education Plan (IEP) or a 504 plan).

The assessment process may be expedited based on the needs of individual students. Parent communication will be an ongoing process before, during, and after the SST/IEP process.

Behavior Intervention Plans

Fortune School provides a full inclusion program for students with special needs. Students with disabilities will be held to the same behavioral expectations as their general education peers. Students with disabilities who have an IEP may require behavioral accommodations/modifications.

If a student is identified to have behavioral concerns, a SST meeting will be convened. In this meeting, the parent/guardian will be provided with an assessment plan to sign. The assessment plan will consist of a Functional Behavioral Analysis completed by a Board Certified Behavior Analyst (BCBA). The

assessment may result in a Behavior Intervention Plan. If it is determined that the student qualifies for an IEP, and the behavior plan has not been effective after several attempts and modifications to the plan, an IEP meeting will be convened for the purpose of a manifestation determination in order to discuss appropriate placement to best meet the student's needs.

Disciplinary action will be based on school-wide policy and procedures, in conjunction with *Individuals with Disabilities Education Improvement Act of 2004* (IDEIA) laws.

Assessments

The term "assessments" shall have the same meaning as the term "evaluation" in the IDEIA, as provided in Section 1414, Title 20 of the United States Code. Fortune School will determine what assessments, if any, are necessary and arrange for such assessments for referred or eligible students in accordance with applicable law. Fortune School will continue to obtain parent/guardian consent to assess its students.

IEP Meetings

Fortune School will continue to arrange and notice the necessary IEP meetings. IEP team membership will continue to be in compliance with state and federal law. Fortune School is responsible for having the following individuals in attendance at the IEP meetings: the Principal and/or Fortune School designated representative with appropriate administrative authority as required by the IDEIA; the student's special education teacher; the student's general education teacher if the student is or may be in a regular education classroom; the student, if appropriate; and other Fortune School representatives who are knowledgeable about the regular education program at Fortune School and/or about the student. Fortune School is responsible for arranging for the attendance or participation of all other necessary staff that may include, but are not limited to, an appropriate administrator to comply with the requirements of the IDEIA, a speech therapist, psychologist, resource specialist, and behavior specialist; and will continue to document the IEP meeting and provide of notice of parental rights.

IEP Development

Fortune School understands that the decisions regarding eligibility, goals/objectives, program, services, placement, and exit from special education are the decision of the IEP team, pursuant to the IEP process. Programs, services and placements are provided to all eligible Charter School students in accordance with the policies, procedures and requirements of the SELPA and State and Federal law. In the case of English Learners, all IEP goals and objectives will be linguistically appropriate. In the goals section of a student's IEP, the box for "linguistically appropriate" will be marked.

IEP Implementation

Fortune School is responsible for all school site implementation of the IEP. As part of this responsibility, Fortune School provides parents with timely reports on the student's progress as provided in the student's IEP, and at least quarterly or as frequently as progress reports are provided for Fortune School's non-special education students, whichever is more. Fortune School provides all home-school coordination and information exchange. Fortune School is responsible for providing all curriculum, classroom materials, classroom modifications, and assistive technology.

Interim and Initial Placements of New Charter School Students

For students who enroll in Fortune School from another school district outside of the SELPA with a current IEP, Fortune School will continue to conduct an IEP meeting within thirty days. Prior to such meeting and pending agreement on a new IEP, Fortune School will continue to implement the existing IEP at Fortune School, to the extent practicable or as otherwise agreed with the parent/guardian.

Non-Public Placements/Non-Public Agencies

Fortune School is solely responsible for selecting, contracting with, and overseeing all non-public schools and non-public agencies used to serve special education students.

Non-discrimination

It is understood and agreed that all children have access to Fortune School and no student shall be denied admission nor counseled out of Fortune School due to the nature, extent, or severity of his/her disability or due to the student's request for, or actual need for, special education services.

Parent/Guardian Concerns and Complaints

Fortune School has adopted policies for responding to parental concerns or complaints related to special education services. Fortune School will continue to receive any concerns raised by parents/guardians regarding related services and rights. Fortune School's designated representative will continue to investigate as necessary, respond to, and address the parent/guardian concern or complaint.

Due Process Hearings

Fortune School may initiate a due process hearing or request for mediation with respect to a student enrolled in the charter school if it determines such action is legally necessary or advisable. In the event that the parents/guardians file for a due process hearing, or request mediation, Fortune School shall defend the case.

SELPA Representation

Fortune School will continue to represent itself at all SELPA meetings.

Funding

Fortune School understands that it will be subject to the allocation plan of the SELPA.

Educational Partner

The *Sacramento Observer* is a weekly newspaper with a circulation of 50,000 that has served Sacramento's African American community since 1962. Dr. William H. Lee, Publisher, is responsible for the paper's growth and development making it an integral part of the local African American community. In keeping with the tradition of the black press, The *Sacramento Observer* both reports the news affecting African Americans and advocates for the welfare of the community.

Education has long been an emphasis of the paper, celebrating black achievement and reporting on the achievement gap experienced by African Americans in public schools. 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. The Observer continues to partner with Fortune School of Education to sponsor outreach efforts to inform parents about the opportunity to enroll their children in a high performing charter school system that promises to move African American student achievement from last to first in the county.

B. MEASURABLE STUDENT OUTCOMES AND OTHER USES OF DATA

“The measurable pupil outcomes identified for use by the charter school.”

-California Education Code section 47605.6(b)(5)(B)

Fortune School’s measurable student outcomes, the method by which pupil progress is measured, and other uses of data are presented in the 2015-16 Local Control Accountability Plan (LCAP), which is included as **Appendix 4**.

C. METHOD BY WHICH PUPIL PROGRESS IS MEASURED

“The method by which pupil progress in meeting those pupil outcomes is to be measured.”

-California Education Code section 47605.6(b)(5)(C)

Fortune School’s measurable student outcomes, the method by which pupil progress is measured, and other uses of data are presented in the 2015-16 Local Control Accountability Plan (LCAP), which is included as **Appendix 4**.

D. LOCATION OF EACH CHARTER SCHOOL FACILITY

“The location of each charter school facility that the petitioner proposes to operate.”

-California Education Code Section 47605.6(b)(5)(D)

Fortune School currently operates five schools at the following locations:

Fortune School – 6829 Stockton Blvd., #380, Sacramento, CA 95823

William Lee College Prep – 3300 Stockton Blvd., Sacramento, CA 95820

Alan Rowe College Prep – 9424 Big Horn Blvd., Elk Grove, CA 95758

Ephraim Williams College Prep – 4545 9th Ave., Sacramento, CA 95820

Hazel Mahone College Prep – 3750 Rosin Ct., Sacramento, CA 95834

During the renewal period, Fortune School plans to open a new middle school campus and an early college high school campus in Elk Grove or South Sacramento.

Transportation

The Charter School shall not provide transportation to and from school, unless it chooses otherwise, except for special education students, pursuant to an IEP.

E. FOUNDERS AND GOVERNANCE STRUCTURE

“The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.”

-California Education Code section 47605.6(b)(5)(E)

Non-Profit Public Benefit Corporation

Fortune School (“Fortune School”) is a directly-funded, independent charter school operated by Fortune School of Education, a California Non-Profit Public Benefit Corporation, pursuant to California law upon approval of this charter.

Fortune School operates autonomously from the Sacramento County Office of Education (“SCOE”), with the exception of the supervisory oversight as required by statute and other contracted services as negotiated between SCOE and Fortune School. Pursuant to California Education Code Section 47604(c), SCOE shall not be liable for the debts and obligations of Fortune School, operated by a California non-profit benefit corporation or for claims arising from the performance of acts, errors, or omissions by Fortune School as long as SCOE has complied with all oversight responsibilities required by law.

Attached, please find the FSE Articles of Incorporation (**Appendix 5**), Corporate Bylaws and 501(c)(3) status document (**Appendix 6**), and Conflicts of Interest Code (**Appendix 7**).

Board of Directors

Fortune School is governed by the FSE Board of Directors (“Board” or “Board of Directors”) in accordance with its adopted corporate bylaws, which are consistent with the terms of this charter. Fortune School will continue to comply with Government Code 87100 and Government Code 1090. The FSE Board shall have five (5) to seven (7) directors. All FSE directors are designated at FSE’s annual meeting of the Board of Directors. Each director holds office unless otherwise removed from office in accordance with the FSE bylaws for two (2) years and until a successor director has been appointed. The FSE Board of Directors is as follows:

- Dr. Paulette Brown Hinds, President, Brown Publishing Company
- Bertha Gorman, Associate Secretary (Ret.); California State Health & Human Services Agency
- Scott Loehr, Superintendent, Center Unified School District
- Rick Rubino, Superintendent, Gridley Unified School District
- Ollie Watson, Principal (Ret.), Del Paso Heights School District

FSE Board Meetings and Duties

The Board of Directors of Fortune School meet regularly, at least quarterly, and in accordance with the Brown Act. The Board of Directors is fully responsible for the operation and fiscal affairs of Fortune School including but not limited to the following:

- Hire, supervise, evaluate, discipline, and dismissal of the President/Chief Executive Officer (“CEO”) of FSE;
- Approve all contractual agreements, including and over \$100,000;
- Approve and monitor the implementation of general policies of Fortune School. This includes effective human resource policies for career growth and compensation of the staff;

- Approve and monitor Fortune School's annual budget and budget revisions;
- Act as a fiscal agent. This includes but is not limited to the receipt of funds for the operation of Fortune School in accordance with applicable laws and the receipt of grants and donations consistent with the mission of Fortune School;
- Contract with an external independent auditor to produce an annual financial audit according to generally accepted accounting practices;
- Establish operational committees as needed;
- Regularly measure progress of both student and staff performance;
- Involve parents and the community in school-related programs;
- Execute all applicable responsibilities provided for in the California Corporations Code;
- Engage in ongoing strategic planning;
- Approve the school calendar and schedule of Board meetings;
- Participate in the dispute resolution procedure and complaint procedures when necessary;
- Approve charter amendments as necessary and submit requests for material revisions as necessary to SCOE for consideration;
- Approve annual independent fiscal audit and performance report;
- Appoint an administrative panel or act as a hearing body and take action on recommended student expulsions.

The Board may initiate and carry on any program or activity or may otherwise act in a manner which is not in conflict with or inconsistent with or preempted by any law and which are not in conflict with this charter or the purposes for which schools are established.

FSE has adopted a Conflict of Interest Code which complies with the Political Reform Act, Corporations Code Conflicts of Interest rules, and which will be updated with any charter school specific conflicts of interest laws or regulations. As noted above, the Conflicts of Interest Code is attached within **Appendix 7**. In addition, FSE will comply with the Public Records Act.

The Board may execute any powers delegated by law to it and shall discharge any duty imposed by law upon it and may delegate to an employee of Fortune School any of those duties with the exception of budget approval or revision, approval of the fiscal audit and performance report, and the adoption of Board policies. The Board, however, retains ultimate responsibility over the performance of those powers or duties so delegated. Such delegation will:

- Be in writing;
- Specify the entity designated;
- Describe in specific terms the authority of the Board of Directors being delegated, any conditions on the delegated authority or its exercise and the beginning and ending dates of the delegation; and
- Require an affirmative vote of a majority of Board members once quorum is established.

Board Training and Sustainability

Fortune School is committed to continuous improvement and ongoing training to assist the FSE Board in fulfilling its responsibilities to act as the steward of Fortune School. To this end, the FSE Board participates in appropriate training and educational opportunities to more effectively govern Fortune School's operations. Such training experiences include individual training sessions with legal counsel or

other experts familiar with public school governance, and/or training sessions with charter school governance experts. Such trainings or professional development are made available to individual Board Members to enhance skills they need to effectively perform a critical role on the FSE Board's behalf, or include full Board training and professional development on matters applicable to the full Board. This includes, for example, training on open meetings laws, conflicts of interest procedures and protocol, disclosure of public records, fiscal oversight and management, oversight of employment programs, and academic program operation and accountability to be sure the Board is fulfilling its oversight responsibilities with fitness.

Selection of FSE Board Members

All FSE Board Members have full voting rights. All Board Members shall be designated by Fortune School ("FS"), the parent organization.

FSE Administration

President/CEO

The President/CEO is the general manager of FSE and shall supervise, direct, and control the corporation's activities, affairs, and officers as fully described in any applicable employment contract, agreement or job specification. The President/CEO has other such powers and duties as the Board of Directors or the FSE bylaws require. The President/CEO presides at the Board of Directors' meetings.

Chief Financial Officer ("CFO")

The CFO keeps and maintains, or causes to be kept and maintained, adequate and correct books and accounts of FSE's properties and transactions. The CFO sends or causes to be given to directors such financial statements and reports as are required to be given by law, by the FSE bylaws, or by the FSE Board. The books of account are open to inspection by any director at all reasonable times.

The CFO will continue to (a) deposit, or causes to be deposited, all money and other valuables in the name and to the credit of FSE with such depositories as the Board of Directors may designate; (b) disburse FSE's funds as the Board may order; (c) render to the President/CEO, Chairman of the Board, if any, and the Board, when requested, an account of all transactions as CFO and of the financial condition of FSE; and (d) have such other powers and perform such other duties as the Board, contract, job specification, or the FSE bylaws may require.

If required by the Board, the CFO shall give FSE a bond in the amount and with the surety or sureties specified by the Board of Directors for faithful performance of the duties of the office and for restoration to FSE of all its books, papers, vouchers, money, and other property of every kind in the possession or under the control of the CFO on his or her death, resignation, retirement, or removal from office.

Chief of Staff/Director of Operations

The Chief of Staff/Director of Operations is responsible for all administrative operations at FSE's charter schools including facilities management, human resources, legal affairs, student enrollment,

information technology, branding, credentialing and procurement. The Chief of Staff/Director of Operations also directs professional development of operational staff at the school sites.

Director of Human Resources

The Director of Human Resources is responsible for staffing and human resources of Fortune School. The Director of Human Resources provides support to the Principals to evaluate, train and discipline employees of Fortune School. In addition, the Director of Human Resources ensures that all employees of Fortune School hold the valid credentials and clear the appropriate background checks as required by state and federal law.

Director of Curriculum and Instruction

The Director of Curriculum and Instruction is responsible for overseeing the instructional program and student academic performance at Fortune School. In addition, the Director of Curriculum and Instruction is responsible for providing professional development for teachers at Fortune School, including in the use of state-adopted instructional materials and data-driven instruction.

School Administration

Principal

The Principal is the leader of a Fortune School campus. The Principal ensures that the curriculum is implemented in order to maximize student learning experiences. The Principal reports directly to the President/CEO, and s/he is responsible for the orderly operation of a Fortune School and the supervision of all employees in a Fortune School. The Principal manages the day-to-day operations of the school. The Principal provides input to the President/CEO and Director of Human Resources for all hiring and evaluation of faculty and staff and all personnel discipline. The Principal is responsible for the implementation of all FSE Board policies and procedures, including, but not limited to organization of all instruction, academic support, and health and counseling services for all students.

The Principal performs assigned tasks as directed by the President/CEO, and is required to undertake some or all of the tasks detailed below. These tasks may include, but are not limited to, the following:

- Ensure Fortune School enacts its mission;
- Supervise and evaluate teachers and staff;
- Provide reports to the FSE Board of Directors;
- Manage school finances to ensure financial stability;
- Participate in and develop professional development workshops as needed;
- Serve or appoint a designee to serve on any committees of Fortune School;
- Interview and recommend employee hiring, promotion, discipline, and/or dismissal;
- Ensure compliance with all applicable state and federal laws and help secure local grants;
- Communicate with parents, recruit new families and students, and assure families of academic growth;
- Take responsible steps to secure full and regular attendance at school of the students enrolled in accordance with policies established by the Board of Directors;
- Complete and submit required documents as requested or required by the charter and/or FSE Board of Directors and/or the County Office of Education;
- Identify the staffing needs of Fortune School and offer staff development as needed;

- Maintain up-to-date financial records;
- Ensure that appropriate evaluation techniques are used for both students and staff;
- Establish and maintain a system to handle organizational tasks such as student records, teacher records, teacher credentialing information, contemporaneous attendance logs, purchasing, budgets, and timetables;
- Ensure the security of the school building;
- Encourage and support teacher professional development;
- Provide all necessary financial reports as required for proper attendance reporting;
- Manage student discipline, and, as necessary, participate in the suspension and expulsion process;
- Participate in IEP meetings as necessary.

The Charter School is a Viable Enterprise

Fortune School has become a viable enterprise as evidenced by its healthy fund balance as reported in the Audit Report (**Appendix II**). The budget projects that we will continue to add to that fund balance over the term of the charter renewal.

Parent Involvement in Governance

One goal of Fortune Schools is to empower parents as educational partners. Parents should feel that their voice and participation at Fortune School influences the development of the school and its components. Parents will continue to have the opportunity to participate in a variety of meaningful ways at Fortune School, and their presence on campus and assisting teachers in the classroom will continue to be most important. Parents will continue to be members of the School Site Council and will continue to be encouraged to participate in the School Site Council meetings.

In order to ensure significant parent involvement, Fortune School will continue to encourage the development of parent-based groups. These groups are responsible for recruiting parents in the activities of Fortune School for the purpose of strengthening the community. All parents and guardians will continue to be encouraged to attend parent-led meetings.

School Site Council

Fortune School campuses have a School Site Council (“SSC”). The SSC provides input to the FSE Board through the Principal on the operations of Fortune School, staff, teachers and students. It reviews and provides input on policies and procedures for expulsions, curriculum, fundraising and governance. School Site Council membership remains consistent with the requirements of Education Code.

Parent Education and Participation

Studies have shown that students whose parents are involved in their education generally have higher grades and test scores, better attendance, more consistently complete homework, higher graduation rates and greater enrollment in postsecondary education.² Fortune School parents are actively involved in the education of students. Fortune School campuses foster a climate of parent

² The National PTA. *Building Successful Partnerships*. Bloomington: National Education Service, 2000. 12.

volunteerism. After signing a “Commitment to Excellence Contract”, parents are encouraged to complete 40 hours of completely voluntary service each academic year. There is no consequence to families if they fail to complete voluntary parent service hours. Parent volunteerism is, however, an important part of Fortune School’s approach to closing the achievement gap and we stand behind it as a part of our culture that calls for parents to accept responsibility for the education of their children.

Parent Liaisons at each campus coordinate a rich program of parent involvement that includes creating a welcoming environment for parents. Front office staff complete customer service training focused on providing excellent customer service, learning parent names, and having difficult conversations in a respectful way. Parent Liaisons create and implement a program of parent engagement including parent meetings, a schedule of seasonal activities and parent groups like Donuts for Dads and Muffins for Moms. Campuses publish parent newsletters and communicate using social media. Fortune School also partners with community-based organizations to provide parent education.

Legal Affirmations

Fortune School will be non-sectarian in its programs, admissions policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate based on any of the characteristics described in Education Code 220. Admission to the charter schools shall not be determined according to the place of residence of the pupil, or of his or her parent or guardian, within this state. Pursuant to Education Code Section 47604(c), the county office of education in performing its oversight of charter schools in the Fortune School network shall not be liable for the debts and obligations of the charter schools or for claims arising from the performance of acts, errors, or omissions by the charter schools, if the authority has complied with all oversight responsibilities required by law. As a non-profit corporation, Fortune School of Education will not operate to the private benefit of any individual or group of individuals, and will instead operate for the benefit of the California public school students it serves.

F. HUMAN RESOURCES

Qualifications of School Employees

“The qualifications to be met by individuals to be employed by the school.”

-California Education Code section 47605.6(b)(5)(F)

Selection and appointment of Fortune School employees is the exclusive prerogative of FSE. FSE holds recruit/release authority for all Fortune School staff, and sets the terms and conditions of employment, within the parameters of the FSE policies and procedures. FSE does not and will not discriminate against any applicant on the basis of his/her race, creed, color, national origin, age, gender, disability or any other basis prohibited by law. All candidates will continue to be required to show evidence of compliance with the California criminal clearance process. Certificated employees will continue to meet the credential requirements for countywide benefit charters established in Education Code. All teachers assigned to provide instruction to English Learners will have the appropriate authorization (CLAD, BCLAD or equivalent).

Staffing Plan

Please see job descriptions in **Appendix 8**.

STAFFING PLAN FOR SCHOOL SITES

	2016-2017	2017-2018	2018-2019
Principal	5	7	7
Dean	2	4	4
Counselor	0	1	1
Multiple Subject Teacher	48	50	52
Education Specialist	5	7	7
English/ELD Teacher	1.5	3	3.5
Math Teacher	1.5	3	3.5
Science Teacher	1.5	3	2.5
Physical Ed Teacher	3	5	7
Social Science Teacher	1.5	3	3.5
Music Teacher	0	0	.5
World Language Teacher	1.5	2	3.5
Art Teacher	1.5	2	2.5
Performing Arts Teacher	2.84	3.74	3.74
Driver's Ed Teacher	0	0	.5
Academic Support Teachers (Early HS Program)	0	0	4
Office Manager	4	6	6
School Secretary	5	7	7
Parent Liaison	3.63	4.89	4.89
Food Service Coordinator	3.87	6	6
Custodian	11.5	15.5	16
Instructional Aide	10.32	11.7	13.08
Behavior/Campus Monitor	6.52	9.28	9.28
TOTAL	119.68	154.11	167.99

NOTE: The positions included in the Staffing Plan represent employees of Fortune School. We contract with non-public agencies for certain Special Education services/roles including, but not limited to: speech, occupational therapy, school psychologist, nurse, counseling.

Organizational Chart

Attached as **Appendix 8**, please find Fortune School of Education's Organizational Chart.

G. HEALTH AND SAFETY

"The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school with a criminal record summary as described in Section 44237."

-California Education Code section 47605.6(b)(5)(G)

Fortune School believes that it is our responsibility to nurture not only students' minds but also their emotional and physical well-being. Fortune School implements a comprehensive set of health, safety, and risk management policies. In general, health and safety matters are dealt with in accordance with these policies. These policies have been developed in consultation with the school's insurance carriers and at a minimum will address the topics described below. These policies and procedures are incorporated as appropriate into the school's student and staff handbooks and are reviewed on an ongoing basis in the school's staff development efforts and governing board policies. Specifically, these policies and procedures address the following topics:

- All enrolling students and staff provide records documenting immunizations to the extent required for enrollment in non-charter public schools.
- Response to natural disasters and emergencies, including fires, floods and earthquakes through a disaster plan that shall be developed in consultation with Camp and School Consulting, which specializes in emergency preparedness and risk management, including disaster plan development.
- Preventing contact with blood-borne pathogens.
- Instructional and administrative staff receive training in emergency response, including appropriate "first responder" training or its equivalent.
- Administration of prescription drugs and other medicines.
- Charter schools in the Fortune School network shall be housed in facilities that have received State Fire Marshal approval and that have been evaluated by a licensed structural engineer who has determined that the facilities present no substantial seismic safety hazard.
- Fortune School is a drug, alcohol and tobacco-free workplace.
- All employees must submit to a criminal background check and furnish a criminal record summary prior to beginning employment with Fortune School of Education, as required by Education Code Sections 44237 and 45125.1.
- A policy that all guest lecturers complete a background statement and be under the supervision of the classroom teacher or designated person at all times.
- A policy that all volunteers must submit to a criminal background check and furnish a criminal record summary prior to volunteering on any Fortune School campus.
- A policy that charter schools in the Fortune network utilize security personnel/school monitors.
- A policy that all visitors be required to sign in at the office and wear a visitor's badge at all times while on school property.
- A policy that Fortune School has established a safe place off the grounds to move students in the event of danger.

Immunizations and Health Screening

All enrolling students and employees must provide records documenting immunizations to the extent required by law, including mandatory tuberculosis risk assessments and examinations (if necessary) for staff and volunteers expected to have prolonged (more than 15 minutes) contact with students, pursuant to Education Code Section 49406. Students, as required by law, have mandatory vision,

hearing and scoliosis screening. As a condition of employment, tuberculosis risk assessments and examinations (if necessary) and are required before the employee's start date. Further, tuberculosis screening is required every four (4) years pursuant to the requirements of Education Code Section 49406(b). Fortune School provides notification to employees and volunteers with sufficient advanced notice to enable those individuals to complete their mandatory tuberculosis screening in a timely manner.

Fingerprinting/Criminal Background Check Process

Each employee of the school will continue to submit to a criminal background check and furnish a criminal record summary as required by Education Code section 44237. The Livescan form for both the Department of Justice and the FBI fingerprinting/criminal background check is distributed by the Director of Human Resources. Once the candidate has notified the Director of Human Resources that they have completed the fingerprinting process, the Director of Human Resources reviews the DOJ database that's associated with Fortune School's ORI number to review DOJ clearances. This serves as proof to verify clearance and make the determination whether or not to allow a candidate to begin employment. The process must be completed before the employee's start date. If the candidate is not cleared, they will not be eligible for employment.

Immunization forms and other pertinent medical records are kept on file confidentially by the school administration. Parents are expected to ensure that their children obtain proper immunizations prior to matriculating pursuant to Chapter 1 (commencing with §120325) of Part 2 of Division 105 of the Health and Safety Code. The school may exempt students from enrolling who are not properly immunized pursuant to §48216 *et seq.* of the Education Code. Those parents who are having difficulty obtaining immunizations for their children are provided information on where to get immunized in their community.

Documentation is on file in the student's records or employee records held in security at the school's primary administrative office. Copies of employee records and student records can be made available at the request of the county office of education.

Student Health

Fortune School works to ensure every student in the school receives proper health care. We have developed a plan to have referral services available to offer low-cost health care to its students and families who are uninsured.

As required by state law, the school provides screening for student vision, hearing and scoliosis, and students must show the required proof of immunization. The school maintains records of legally required tests and immunizations of students and staff. Fortune School also has a policy establishing the school as a drug, alcohol, and tobacco free workplace.

Bloodborne Pathogens

Fortune School implements policies relating to preventing contact with blood-borne pathogens. The Principal at each school, with support from Fortune School's charter management organization, ensures that each charter in the network meets state and federal standards for dealing with bloodborne pathogens and other potentially infectious materials in the workplace. Fortune School has

established a written “Exposure Control Plan” designed to protect employees from possible infection due to contact with blood-borne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus (HBV). Whenever exposed to blood or other body fluids through injury or accident, students, and staff follow the latest medical protocol for disinfecting procedures.

Child Abuse Prevention and Reporting

Fortune School maintains detailed policies and procedures for the immediate reporting of suspected child abuse, acts of violence, or other improprieties. Such policies detail the role and obligation of staff in the reporting of child abuse pursuant to CA Penal Code Section 11164. California Penal Code section 11166 requires any child care custodian who has knowledge of, or observes, a child in his or her professional capacity or within the scope of his or her employment whom she or he knows or reasonably suspects has been the victim of child abuse to report the known or suspected instance of child abuse to a child protective agency immediately, or as soon as practically possible, by telephone and to prepare and send a written report thereof within thirty-six (36) hours of receiving the information concerning the incident. All appropriate staff is required to certify that he or she has knowledge of California Penal Code section 11166 and will comply with its provisions before being hired. Fortune School staff will complete training pursuant to Education Code 44691(b)(1).

Diabetes

Fortune School provides an information sheet regarding Type 2 diabetes to the parent or guardian of incoming 7th grade students, pursuant to Education Code Section 49452.7. The information sheet includes all of the following information:

1. A description of Type 2 diabetes.
2. A description of the risk factors and warning signs associated with type 2 diabetes.
3. A recommendation that students displaying or possibly suffering from risk factors or warning signs associated with type 2 diabetes should be screened for type 2 diabetes.
4. A description of treatments and prevention of methods of type 2 diabetes.
5. A description of the different types of diabetes screening tests available.

Emergency Preparedness

Fortune School will continue to adhere to an Emergency Preparedness Handbook drafted specifically to the needs of the school site in conjunction with law enforcement and the Fire Marshal. This handbook includes, but is not limited to the following responses: fire, flood, earthquake, terrorist threats, and hostage situations. If assuming a facility that was previously used as a School site, any existing emergency preparedness plan for the school site shall be used as a starting basis for updating the handbook for Fortune School.

Comprehensive Sexual Harassment Policies and Procedures

Fortune School is committed to providing schools that are free from sexual harassment, as well as any harassment based upon such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation, or disability. Fortune School has developed a comprehensive policy to prevent and immediately remediate any concerns about sexual discrimination

or harassment at the charter school (including employee to employee, employee to student, and student to employee misconduct). Misconduct of this nature is very serious and will be addressed in accordance with Fortune School’s sexual harassment policy.

H. RACIAL AND ETHNIC BALANCE

“The means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.”

-California Education Code section 47605.6(b)(5)(H)

Fortune School has implemented a student recruitment strategy that is represented by, but is not necessarily limited to, a combination of the following elements or strategies, ensuring a diverse student body and a racial and ethnic balance among students that is reflective of the County:

- An enrollment process that is scheduled and adopted that includes a timeline that allows for a broad-based recruiting and application process.
- The development and distribution of promotional and informational material that appeals to all of the various racial and ethnic groups represented in Sacramento County, including materials in languages other than English to appeal to English Learner populations.
- The distribution of promotional and informational materials to a broad variety of community groups and agencies.
- Outreach meetings in several areas of the county, reaching prospective students and parents. Fortune School keeps a record of the number and location of these community presentations.
- Use of brochures, newsletter, TV/radio public service announcements, print and non-print media for outreach communications.
- Collaboration with community based organizations to support outreach efforts.

I. AUDITS

“The manner in which an annual, independent, financial audit shall be conducted in accordance with regulations established by the state board and the manner in which audit exceptions and deficiencies shall be resolved.”

-California Education Code section 47605.6(b)(5)(I)

An annual independent financial audit of the books and records of the charter school is conducted as required by Education Code Sections 47605(b)(5)(I) and 47605(m). The books and records of the charter school are kept in accordance with generally accepted accounting principles, and as required by applicable law, and the audit employs generally accepted accounting procedures. The audit is conducted in accordance with applicable provisions within the California Code of Regulations governing audits of charter schools as published in the State Controller’s K-12 Audit Guide.

The audit committee selects an independent auditor through a request for proposal format. The auditor is required to have, at a minimum, a CPA and educational institution audit experience and must be approved by the State Controller on its published list as an educational audit provider. To the

extent required under applicable federal law, the audit scope is expanded to include items and processes specified in applicable Office of Management and Budget Circulars.

The annual audit is completed and forwarded to the County Superintendent of Schools, the State Controller, and the CDE no later than December 15 following the close of the school year. The audit committee reviews any audit exceptions or deficiencies and reports to the FSE Board with recommendations on how to resolve them. The FSE Board will submit a report to the county office of education describing how the exceptions and deficiencies have been or will be resolved to the satisfaction of the county office of education, along with an anticipated timeline for the same. Audit appeals or requests for summary review shall be submitted to the Education Audit Appeals Panel (“EAAP”) in accordance with applicable law.

The independent financial audit of the Charter School is public record to be provided to the public upon request. (Please see **Appendix I I** for the latest Audit Report.)

J. DISCIPLINE, SUSPENSION/EXPULSION PROCEDURES

“The procedures by which pupils can be suspended or expelled.”

-California Education Code section 47605.6(b)(5)(j)

Students are responsible for their actions and are expected to adhere to the Commitment to Excellence Contract and school rules and policies. If a student is in violation of a school rule or policy, a teacher or staff member will refer him/her to the appropriate administrator to determine the consequences based on the type and severity of the violation.

Corporal Punishment will not be permitted at any Fortune school. Any employee who engages in such action will be terminated immediately.

California Educational Code Section 48900

A pupil may be suspended from school or recommended for expulsion if the Principal of the school in which the pupil is enrolled determines that the pupil has committed an act as defined pursuant to Education Code 48900.

Due Process Protections

Prior to student discipline, especially those involving suspension or expulsion or other limitation of fundamentally protected student rights, every student will have access to the maximum due process protections provided under the law, within the context of the circumstances. Students who are being considered for suspension and expulsion will be provided the specific due process protections provided below to safeguard the student’s interests within the situation.

Suspension Procedure

Suspensions shall be initiated according to the following procedures:

Informal Conference

Suspension shall be preceded by an informal conference conducted by the principal or designee with the student and whenever practical, the teacher, supervisor or school employee who referred the student to the principal. The conference may be omitted if the principal or designee determines that an emergency situation exists. An “emergency situation” involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student’s right to return to school for the purpose of a conference.

Notice to Parents/Guardians

At the time of the suspension, a charter school employee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may add that state law requires the parent/guardian to respond to such requests without delay.

Authority to Expel

Only the Fortune School of Education Board of Directors, upon the recommendation of the expulsion panel, may expel a student. The governing board may expel any student found to have committed an expellable offense(s) listed in the “Grounds for Suspension and Expulsion” in the student handbook. Except for expulsions for offenses listed under Education Code Section 48915(c), a student may only be expelled upon the findings and recommendations of the expulsion panel if the charter school governing board finds that the student committed the expellable offense and at least one of the following findings may be substantiated:

- 1) That other means of correction are not feasible or have repeatedly failed to bring about proper conduct.
- 2) That due to the nature of the violation, the presence of the student causes a continuing danger to the physical safety of the student or others.

Expulsion Procedure

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. The hearing shall be held within thirty (30) school days after the charter school principal or designee determines that one of the acts listed under “Grounds for Suspension and Expulsion” has occurred. The hearing will be conducted by the expulsion panel. The charter school principal will make a recommendation to the expulsion panel. The expulsion panel shall consist of at least three members who are certificated and neither a teacher of the pupil or a board member of the charter school’s board. Written notice of the hearing shall be forwarded to the student and the student’s parent/guardian at least ten (10) calendar days before the date of the hearing. The notice shall include:

- 1) The date and place of the hearing;
- 2) A statement of the specific facts, charges and offense upon which the proposed expulsion is based;

- 3) A copy of the school's disciplinary rules which relate to the alleged violation;
- 4) Notification of the student's or parent/guardian's obligation to provide information about the student's status to any other district in which the student seeks enrollment;
- 5) The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel;
- 6) The right to inspect and obtain copies of all documents to be used at the hearing;
- 7) The opportunity to confront and question all witnesses who testify at the hearing; and
- 8) The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

Suspension/Expulsion Procedures for Students with Special Needs

Students with disabilities will be suspended or expelled from a Fortune school for any offense for which their general education peers would be suspended or expelled, and are subject to the same due process procedures that apply to general education students, except where state or federal laws require additional or different procedures. Fortune School will follow all state and federal laws when imposing discipline on a student with disabilities, including conducting a manifestation determination meeting as required by law.

Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

Presentation of Evidence

While technical rules of evidence do not apply to an expulsion hearing, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the expulsion panel to expel must be supported by substantial evidence that the student committed any of the acts listed in "Grounds for Suspension and Expulsion" in the student handbook.

Finding of facts shall be based solely on the evidence at the hearing. While no evidence shall be based solely on hearsay, sworn declarations may be admitted as testimony from witnesses whose disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm. The decision of the expulsion panel shall be in the form of a recommendation to the charter school governing board which will make a final determination regarding the expulsion.

Written Notice to Expel

The principal or designee following a decision of the charter school governing board to expel shall send written notice of the decision to expel to the student or parent/guardian. This notice shall include the following:

- 1) The specific offense committed by the student or any of the acts listed in "Grounds for Suspension and Expulsion" in the student handbook (**Appendix 12**)
- 2) Notice of the right to appeal the expulsion
- 3) Notice of the student's or parent /guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the charter school

The principal, or designee, shall send written notice of the decision to expel to the student's district of residence and the county office of education. This notice shall include the following:

- 1) The student's name
- 2) The specific offense committed by the student

Upon expulsion from the charter school, students will be referred to their district of residence to attend school pursuant to the procedure of their district of residence pertaining to expelled students.

Additional Due Process Rights

Every student is entitled under fundamental principles of due process to know precisely what conduct is prohibited prior to being disciplined for such conduct, and to possess ample opportunity to review the evidence presented and provide a response to such evidence. The due process protections afforded to pupils prior to suspension and expulsion are provided above, and further rights, such as the right to appeal, record-keeping, and rehabilitation and re-admittance are included below.

Appeal Rights

Following receipt of the notice of expulsion or suspension, the student shall have the right to appeal that decision to the full Fortune School of Education Board of Directors. The student shall have 10 days to present her/his intention to appeal the decision. Upon the appeal, the student shall have the right to a de novo review in front of the full governing board in closed session, including the full complement of due process rights available to the student during the initial hearing. The full governing board will then render a final decision regarding the student's appeal.

Disciplinary Records

The school shall maintain records of all student suspensions and expulsions at each charter school. Such records shall be made available for the district / county office's review upon request, but neither the district nor county office of education shall be involved in the disciplinary decision.

Expelled Pupils/Alternative Education

Pupils who are expelled shall be responsible for seeking alternative education programs including but not limited to programs within the county or their school district of residence.

Rehabilitation Plans

Students who are expelled shall be given a rehabilitation plan upon expulsion as developed by the governing board at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply for readmission.

Readmission

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be the sole discretion of the governing board following a meeting with the principal and the pupil and guardian or representative, to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will

be disruptive to the school environment. The principal shall make a recommendation to the governing board following the meeting regarding his or her determination.

K. RETIREMENT SYSTEMS

“The manner by which staff members of the charter schools will be covered by the State Teachers’ Retirement System, the Public Employees’ Retirement System, or federal social security.”

-California Education Code section 47605.6(b)(5)(K)

All employees at Fortune School participate in the federal social security system as required by law and have access to an FSE-sponsored 403(b) retirement plan, according to policies developed by the Board of Directors and adopted as Fortune School's employee policies. The CFO is responsible for ensuring that appropriate arrangements for coverage have been made. Fortune School is not planning to participate in CALSTRS or CALPERS.

Salary

Fortune School has adopted a formal salary schedule (see **Appendix 9**). The salary schedule is based on periodic compensation studies comparing Fortune School to comparison school districts in the region.

L. DISPUTE RESOLUTION

“The procedures to be followed by the charter school and the county board of education to resolve disputes relating to provisions of the charter.”

-California Education Code section 47605.6(b)(5)(L)

Fortune School maintains policies and processes for aiding and resolving internal and external disputes.

Intent

The intent of this dispute resolution process is to (1) resolve disputes within the school pursuant to the school’s policies, (2) minimize the oversight burden on SCOE as Fortune School’s authorizing agent, (3) ensure a fair and timely resolution of disputes, and (4) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight. Fortune School and SCOE intend to resolve disputes informally wherever possible, and only to use the dispute resolution process herein when informal attempts have failed.

Public Comments

The staff and governing board members of Fortune School and SCOE agree to resolve all disputes regarding this charter school pursuant to the terms of this section. Both agree to refrain from public commentary regarding any disputes until the matter has progressed through this dispute resolution process. Notwithstanding this, both Fortune School and SCOE may discuss disputes in public meetings of their respective boards as required by the Brown Act and shall respond to Public Records requests as required by law.

Disputes Arising From Within the School

Disputes over personnel discipline are not covered by Fortune School's dispute resolution process, and instead, are resolved through the personnel policies and procedures. Fortune School maintains comprehensive personnel policies and procedures, approved by the Fortune School of Education Board of Directors that are provided to each employee upon hire. These policies set forth personnel obligations, rights, responsibilities, complaint procedures, discipline procedures, and other pertinent policies essential to preserving a safe and harmonious work environment. The Principal resolves complaints and grievances and administer any personnel discipline, with the assistance of the Director of Human Resources, the President/CEO, and/or the Board of Directors, if necessary, in accordance with these policies.

SCOE agrees to refer all complaints regarding the school's operations to Fortune School for resolution in accordance with the school's adopted policies. Parents, students, Board Members, volunteers, and staff of Fortune School are provided with a copy of the schools' policies and dispute resolution process and agree to work within its bounds. In the event that Fortune Schools' adopted policies and processes fail to resolve the dispute, the county office of education shall avoid intervening in the dispute without the consent of the Fortune School Board of Directors unless the matter directly relates to one of the reasons specified in law for which a charter may be revoked (see Education Code Section 47607 and its implementing regulations), the County Superintendent receives parent complaints or other information that he/she deems worthy of further investigation pursuant to Education Code section 47604.4, it relates to the authority of SCOE to monitor and oversee Fortune School (see Education Code 47604.32), or SCOE is acting under the authority provided to it under Charter Schools Act of 1992 as it may be amended from time to time.

Disputes arising from within the school, including all disputes among and between students, staff, parents, volunteers, advisors, and partner organizations and Board Members of the school, will continue to be resolved by Fortune School and the FSE Board of Directors pursuant to policies and procedures developed by Fortune Schools' governing board, which shall ensure that such policies and procedures are drafted in accordance with applicable laws.

Disputes Between Fortune School and SCOE

In the event that Fortune School and the county office of education have disputes regarding the terms of this charter or any other issue regarding Fortune School, both parties agree to follow the process outlined below.

In the event of a dispute between Fortune School and the county office of education that cannot be resolved informally, the staff and Board of Directors of Fortune School and the county office of education agree to first frame the issue in written format and refer the issue to the county superintendent, and the Fortune School President/CEO.

In the event there is a dispute between the parties and the issue does not rise to the level of a revocation of the charter, the dispute shall be resolved by the following steps:

- a. Fortune School representative and the county superintendent, or his/her designee, shall informally meet and confer in a timely fashion to attempt to resolve the dispute

- b. In the event that this informal meeting fails to resolve the dispute, both parties shall identify two board members from their respective boards who shall jointly meet with the county superintendent, or his/her designee, and the representative of Fortune School and attempt to resolve the dispute.
- c. If this joint meeting fails to resolve the dispute, the county superintendent, or his/her designee, and Fortune School representative shall meet to jointly identify a neutral, third party mediator, and shall follow the process for mediation described in subsection c below.

In the event that the county superintendent, or his/her designee, believes that the dispute relates to an issue that could lead to revocation of the charter, this shall be specifically noted in the written dispute statement and the following steps will be taken first:

- a. Cause of Revocation: The county board of education may revoke the charter if the county board finds that the conditions for revocation contained in Education Code Section 47607 have been met after providing Fortune School with all due process required by Education Code Section 47607 and its implementing regulations.
- b. Notice to Remedy ("Notice"): Prior to the revocation of the charter, the county office of education shall first meet with representatives of Fortune School to attempt to informally resolve the issue(s). If this meeting does not resolve the issue(s), SCOE shall then provide written Notice to Fortune School which meets the requirements of Education Code Section 47607 and its implementing regulations.
- c. Mediation: Within 30 days of service of the Notice unless the parties mutually agree to a longer time period, the parties may mutually agree to schedule a mediation to resolve the matter. If the parties agree to a mediation, the parties shall mediate in good faith. The mediator shall be selected by mutual agreement of the parties and cost of the mediation shall be borne equally by both parties.
- d. Dispute Resolution Process Shall Not Impede Revocation Process: Notwithstanding any other provision of the charter, participation in dispute resolution procedures outlined in this section shall not be interpreted to impede or act as a prerequisite to the County Board's authority to proceed with revocation in accordance with Education Code Section 47607.

M. EMPLOYEE REPRESENTATION

"A declaration whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act."

-California Education Code section 47605.6(b)(5)(M)

Fortune School shall be deemed the exclusive public school employer of the employees of the charter school for the purposes of the Education Employment Relations Act (EERA). Under the EERA, Fortune School employees shall have the right to form a collective bargaining unit and to negotiate directly with the charter school. If the employees lawfully form a collective bargaining unit with a representative designated to negotiate with the charter school on their behalf, the charter school shall negotiate matters covered by the EERA directly with that representative. These matters may include such items as salary levels (which may be based upon such factors as educational degree attained, years of teaching experience and/or other factors), employee benefits (health plan provider, levels of coverage and co-payments, retirement plans, vacation days, dental and vision coverage, etc.),

number of work days per year and number of teaching hours per day, and work rules (including required breaks).

N. STUDENT ADMISSIONS AND ATTENDANCE POLICIES

“Admission requirements of the charter school, if applicable.”

-California Education Code section 47605.6(b)(5)(N)

Student Admission Policies and Procedures

Fortune School will continue to actively recruit a diverse student population. Admission is open to any California resident, and all students will continue to be considered for admission without regard to the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code or association with an individual who has any of the aforementioned characteristics). Fortune School strives through recruiting efforts to achieve a racial and ethnic balance of students that reflects the general population within the territorial jurisdiction of the Sacramento County Office of Education. Fortune School will continue to follow the law related to admission of homeless and foster youth.

Fortune School seeks to enroll students committed to a rigorous educational experience. Families who understand and value Fortune School’s mission and will commit to Fortune School’s instructional and operational philosophy are actively recruited. Prospective students and their parents or guardians are briefed regarding the school’s instructional and operational philosophy and are informed of the school’s student-related policies.

In order for students to be enrolled in Fortune School, they must first fill out a Student Application (**Appendix 13**) in concert with their parents. Students and their parents/guardians must be willing to take part in an orientation session that will introduce Fortune School’s philosophical and operational underpinnings and policies. At orientation, students and parents/guardians are asked to sign an annual parent/student contract to acknowledge that they understand and support Fortune School’s outcomes, philosophy, program and any other applicable requirements. Though parents will be strongly encouraged to sign the contract, a student is not penalized for the failures of his/her parents, whether it is the signing of the contract or the fulfilling of its terms. A student will not be suspended or expelled from Fortune School for breaching the contract without due process.

Kindergarten Enrollment

To protect the health and safety of the school environment, in order for a child to enroll in Transitional Kindergarten or Kindergarten at Fortune School, the child must be toilet trained unless the child has a documented medical reason from his/her physician or an identified need in their IEP explaining why they cannot be toilet trained.

High School Enrollment

9th grade is the preferred entry point for a Fortune high school. Students who have been promoted from a Fortune middle school will receive automatic admission to a Fortune high school for 9th grade.

All other students must complete the following enrollment process in addition to the steps already articulated in the charter petition:

1. An in-person interview with student, parent/guardian and a school official.
2. Personal Statement
3. Letter of recommendation from a principal or teacher with knowledge of the student.

Any student who applies with a complete application and who completes the enrollment process will be enrolled.

Recruiting and Admissions Cycle

Fortune School has established an annual recruiting and admissions cycle, which includes reasonable time for all of the following: (1) outreach and marketing, (2) orientation sessions for students and parents, (3) an open enrollment period, (4) an admissions lottery, if necessary, and (5) enrollment. Fortune School will continue to fill vacancies or openings that become available after this process using a waiting list. Fortune School will continue to admit students at any time during the school year on an open-ended basis in a manner that best serves the needs of students.

Timeline for Recruiting and Enrollment

Applications for admission are due by the second Friday in February. Fortune School holds parent information meetings for parents to learn more about the school as they apply.

Lottery – Public Random Drawing

If the number of applications does not exceed the capacity of Fortune School, there will be no lottery, and all students who submitted complete applications are enrolled. In the event that the number of students seeking admission to any grade level exceeds capacity, a lottery is held. It is completed by pulling slips of paper with applicants' names on them out of a container, and the drawing is held in a public forum. All names are drawn from the container and those exceeding the number of available spaces are placed on a waiting list in the order drawn. Fortune School may grant priority in admissions to current students and residents of Sacramento County, as provided in current law. The school may also grant admission preference to children of founders and children of school faculty, provided that students admitted under any such preference shall not constitute more than 10 percent of the school's total enrollment.

The waiting list from a prior year is rolled over to the next year in the order in which students were originally placed on the waiting list, except in case of students who have preference. Students with preference supersede the waitlist as follows:

- (1) children and grandchildren of founding members of Fortune School;
- (2) children of FSE employees;
- (3) siblings of existing students

After the lottery, families receive their official enrollment forms and are informed of the enrollment process detailed in Fortune School's policies and procedures. Currently-enrolled students do not participate in the random drawing, as they are automatically reserved a space for the following year. Other categories of students who do not participate in the random drawing, provided that there is space, in the following order are:

1. Existing students of Fortune School,
2. Children and grandchildren of founding members of Fortune School,
3. Children of FSE employees
4. Siblings of existing students;
5. Pupils placed on the waiting list in previous year(s)
6. Pupils who reside in Sacramento county.

Admission is not based on prior student performance or admission testing.

Attendance Tracking

Fortune School recognizes that the most important factor in student achievement is that students are at school every day. Fortune School uses PowerSchool for its student information system. PowerSchool allows school staff to track student attendance by teachers taking role at the beginning of each class. Fortune School uses School Messenger to make phone calls home for students not at school. PowerSchool is accessible for parents to monitor their child(ren)'s attendance.

O. PUBLIC SCHOOL ATTENDANCE ALTERNATIVES

“The public school attendance alternatives for pupils residing within the county that choose not to attend charter schools.”

-California Education Code Section 47605.6(b)(5)(O)

No student is required to attend Fortune School. Students who reside within the county who choose not to attend Fortune School may attend any school within the county according to county and/or district policy. Parents and guardians of each student enrolled in Fortune School are informed on admissions forms that the students have no right to admission in a particular school of a local education agency as a consequence of enrollment in Fortune School, except to the extent that such a right is extended by the local education agency.

P. RIGHTS OF COUNTY OFFICE OF EDUCATION EMPLOYEES

“A description of the rights of any employee of the county office of education, upon leaving the employment of the county office of education to be employed by the charter school, and a description of any rights of return to the county office of education that an employee may have upon leaving the employ of the charter school.”

-California Education Code section 47605.6(b)(5)(P)

No public school district employee or employee of the Sacramento County Office of Education shall be required to work at Fortune School. Members of Fortune School staff who leave employment with Sacramento County Office of Education to work at Fortune School shall not have any right to return to employment within the county office of education without prior consent by the county office of education.

Employees of Fortune School who were not previous employees of the county office of education will not become employees of the county office of education and will not have the right to employment within the county office of education upon leaving employment of Fortune School.

Upon dismissal from Fortune School, no previous county office employee may return to the county office for employment without the prior written consent of the county office.

Q. CLOSURE PROTOCOL

“A description of the procedures to be used if the charter school closes. The procedures shall ensure a final audit of the school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of public records.”

-California Education Code section 47605.6(b)(5)(Q)

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. This notice will also include the name(s) of and contact information for the person(s) to whom reasonable inquiries may be made regarding the closure; the pupils’ school districts of residence; and the manner in which parents/guardians may obtain copies of pupil records, including specific information on completed courses and credits that meet graduation requirements.

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.

The FSE Board will also develop a list of pupils in each grade level and the classes they have completed, together with information on the pupils’ districts of residence, which they will provide to the entity responsible for closure-related activities.

As applicable, the Charter School will provide parents, students and the resident districts with copies of all appropriate student records and will otherwise assist students in transferring to their next school. All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act (“FERPA”) 20 U.S.C. § 1232g. Fortune School of Education will maintain student records for a term and in a manner consistent with applicable federal and state law.

All state assessment results, special education records, and personnel records will be transferred to and maintained by the entity responsible for closure-related activities in accordance with applicable law.

As soon as reasonably practical, the charter school will prepare final financial records. The charter school will also have an independent audit completed within six months after closure. The charter school will pay for the final audit. The audit will be prepared by a qualified Certified Public Accountant

selected by the charter school and will be provided to the Sacramento County Office of Education promptly upon its completion. The final audit will include an accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value, an accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation, and an assessment of the disposition of any restricted funds received by or due to the charter school.

The charter school will complete and file any annual reports required pursuant to Education Code section 47604.33.

On closure of the charter school, all assets of the charter school, including but not limited to all leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by students attending the charter school, remain the sole property of FSE and upon the dissolution of the non-profit public benefit corporation shall be distributed in accordance with the Articles of Incorporation. Any assets acquired from the Sacramento County Office of Education or Sacramento County Office of Education property will be promptly returned upon charter school closure to the Sacramento County Office of Education. The distribution shall include return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports, as well as the return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.

On closure, the charter school shall remain solely responsible for all liabilities arising from the operation of the charter school.

As the charter school is operated by a non-profit public benefit corporation, should the corporation dissolve with the closure of the charter school, the FSE Board will follow the procedures set forth in the California Corporations Code for the dissolution of a non-profit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.

As specified by the Budget in **Appendix 10**, the charter school will utilize the reserve fund to undertake any expenses associated with the closure procedures identified above.

FINANCIAL PLANNING, REPORTING, AND ACCOUNTABILITY

“The petitioner or petitioners shall also be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cash flow and financial projections for the first three years of operation.”

-California Education Code section 47605.6(h)

Budgets

A financial plan for the charter school, including an operational budget and three-year cash flow and financial projections, is attached as **Appendix 10**.

Financial Reporting

Financial Systems and Processes

FSE will continue to perform the business operations for Fortune School. The Chief Financial Officer oversees those services to ensure that they are meeting the needs of the charter school. FSE organizes the school's chart of accounts in an accounting software package that accommodates all reporting needs.

Accounting System

FSE uses Cougar Mountain Software's Fund Accounting Suite to maintain its financial records. This is a fully integrated fund accounting package developed for non-profits that includes modules for accounts payable, accounts receivable, payroll, purchasing, inventory and cash management in addition to the general ledger. The chart of accounts allows for a user defined account code structure that can accommodate the SACS account segments.

Budget and Financial Reporting Schedule

Fortune School annually prepares and submits its financial information to the Sacramento County Office of Education as follows:

- On or before July 1, a preliminary budget for the next fiscal year
- On or before December 15, an interim financial report which reflects changes to the preliminary budget through October 31
- On or before March 15, a second interim financial report which reflects changes to the preliminary budget through January 31
- On or before September 15, a final unaudited financial report for the prior full fiscal year

Other Financial Reports

Fortune School utilizes PowerSchool, a student information system for attendance and CALPADS reporting, which complies with state law and the County Office of Education's requirements. Fortune School is a direct-funded charter school. Fortune School deposits its funds in a non-speculative and federally insured bank account for use by the school. Fortune School provides the following reports that are required by law: California Basic Educational Data System (CBEDS), actual Average Daily Attendance reports, and School Accountability Report Card (SARC).

Insurance

Fortune School secures and maintains, as a minimum, insurance as set forth below to protect Fortune School from claims that may arise from its operations. The following insurance policies are required:

1. Workers' Compensation Insurance in accordance with provisions of the California Labor Code, adequate to protect Fortune School of Education (employer) from claims under Workers' Compensation Acts, which may arise from its operations.
2. Educator Legal, Professional Liability, General Liability, and Employee Benefits having a coverage limit of no less than \$5,000,000 per occurrence/claim and \$10,000,000 in the aggregate, and a per occurrence deductible of no greater than \$10,000. Fortune School's current general liability and umbrella coverage exceeds these limits by providing \$18,000,000 per occurrence and \$20,000,000 in the aggregate.

3. Fiduciary liability and crime policies coverage shall be no less than \$1,000,000 per occurrence/claim and \$2,000,000 in the aggregate.
4. Property damage coverage sufficient to replace, at current market value, and with any required or necessary code upgrades, all personal real property (unless excused from providing such coverage by a property owner of leased property), fixtures and personal property owned or under the care, custody, or control of Fortune School.

Insurance Certificates

Fortune School keeps on file certificates signed by an authorized representative of the insurance carrier. Certificates are endorsed as follows: The insurance afforded by this policy shall not be suspended, cancelled, reduced in coverage or limits or non-renewed except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the county office of education. The Board, the Sacramento County Office of Education and its officers, and its employees shall be named as additional insured's on such policy. Copies of certificates and notices shall be sent by the insurance carrier directly to the Board and SCOE.

Optional Insurance

Should Fortune School deem it prudent and/or desirable to have insurance coverage for auto liability, damage or theft to school, employee or student property, for student accident, or any other type of insurance coverage not listed above, such insurance shall not be provided by the county office of education and its purchase shall be the responsibility of the charter school.

ADMINISTRATIVE SERVICES

"The manner in which administrative services of the school are to be provided."

-California Education Code section 47605.6(h)

Fortune School's CFO is responsible for administering the charter school under policies adopted by FSE. The Charter School works with FSE for the provision of much of its administrative services. FSE has a demonstrated track-record of experience managing California public funds and providing similar services for various publicly funded California programs, including the Troops for Teachers Program. FSE meets Fortune School's service needs based on mandatory state data tracking and reporting requirements. Administrative services include human resources, payroll, accounts payable, student accounting (attendance, CALPADS), food service program management and financial reporting.

Pursuant to California Law, Sacramento County Office of Education will continue to be required to provide oversight and performance monitoring services, including, but not limited to, monitoring charter school and student performance data, reviewing the Charter School's financial statements and audit reports, performing annual site visits, engaging in the dispute resolution process, and considering charter material revisions and renewal requests.

Fortune School will continue to coordinate with the County to report pertinent STRS payroll data if STRS is used. The county may request a reasonable fee for coordinating this transfer of data. Fortune School remains responsible for obtaining its own health benefits via small business plan type offerings

from local vendors (e.g., Kaiser and Blue Cross). Employee benefits include health, dental, and vision insurance.

Fortune School may elect to purchase administrative services from the county upon mutual agreement between both parties. Such services may include site budgeting, instructional programs, development, custodial services, food services, accounting, payroll and purchasing services, and some degree of personnel support. Specific terms of most of these services should be covered by the memorandum of understanding. Fortune School reserves the rights to purchase additional administrative or other goods or services from any third party as needed.

IMPACT ON THE CHARTER AUTHORIZER

“Potential civil liability effects, if any, upon the school and upon the authorizer.”

-California Education Code section 47605.6(h)

Fortune School is operated by a California non-profit public benefit corporation. This corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701(d).

Pursuant to Education Code Section 47604(c), an entity that grants a charter to a charter school operated by or as a non-profit public benefit corporation shall not be liable for the debts or obligations of Fortune School or for claims arising from the performance of acts, errors or omissions by Fortune School if the authority has complied with all oversight responsibilities required by law. Fortune School will continue to work diligently to assist the county office in meeting any and all oversight obligations under the law, including monthly meetings, reporting, or other county office-requested protocol to ensure the county office shall not be liable for the operation of Fortune School.

Further, Fortune School and the county office will again enter into a memorandum of understanding, wherein Fortune School will indemnify the county office for the actions of Fortune School under this charter.

The corporate bylaws of Fortune School provide for indemnification of Fortune School’s Board, officers, agents, and employees, and Fortune School has purchased general liability insurance, Board Members and Officers insurance, and fidelity bonding to secure against financial risks.

As stated above, insurance amounts will be determined by recommendation of the county office and Fortune School’s insurance company for schools of similar size, location, and student population. The county office shall be named an additional insured on the general liability insurance of Fortune School.

The FSE Board will continue to institute appropriate risk management practices as discussed herein, including screening of employees, establishing codes of conduct for students, and dispute resolution. The school does not anticipate any potential liability effects on school districts where the charter school may locate sites under this charter.

GENERAL PROVISIONS OF THE PROPOSED CHARTER

Charter Renewal Term

The term of this charter renewal shall be the 1st of July 2016 through the 30th of June 2021. This charter may be renewed for one or more subsequent five (5) year terms upon the mutual agreement of the parties.

Revisions

Material revisions of this charter may be made in writing with the mutual consent of the Sacramento County Office of Education, Sacramento County Board of Education and the Fortune School governing board. Material revisions and amendments shall be made pursuant to the standards, criteria, and timelines set forth in Education Code section 47605.6; provided, however, that Fortune School shall not be required to obtain petition signatures prior to making material amendments to the charter petition.

Severability

The terms of this charter are severable. In the event that any of the provisions are determined to be unenforceable or invalid for any reason, the remainder of the charter shall remain in effect, unless mutually agreed otherwise by the respective boards of Fortune School and the Sacramento County Office of Education. The county office of education and school agree to meet to discuss and resolve any issues or differences relating to invalidated provisions in a timely and good faith manner.

Miscellaneous

The Sacramento County Office of Education and Fortune School shall engage in a mutually agreeable MOU, which outlines further details of the relationship between the County Office and Fortune School. The MOU may include, but not be limited to, the following:

- special education services and funding formulas;
- transportation and food services to be provided by the County Office, if any;
- services to be purchased by Fortune School from the County Office, and the fee schedule for such services;
- details of the oversight and monitoring relationship between Fortune School and the County Office;
- mutual indemnification from loss;
- cash advances to handle cash flow issues, if necessary;
- charter school's receipt of mandated cost reimbursement;
- fiscal reporting requirements to the state, either independently or through the County Office, and
- County Office of Education support for Fortune School in seeking additional funding.

Fortune School may purchase administrative services from the County Office of Education upon mutual agreement between both parties. Such services include site budgeting, instructional programs, development, custodial services, food services, accounting, payroll and purchasing services, and some degree of personnel support. Specific terms of most of these services should be covered by the MOU.

Fortune School reserves the rights to purchase additional administrative or other goods or services from any third party as needed.

The Sacramento County Office of Education shall provide oversight and performance monitoring services, including the monitoring of school and student performance data, reviewing the school's financial statement and audit reports, performing annual site visits, and considering charter amendment and renewal requests.

The MOU delineates the liability of the Sacramento County Office of Education if Fortune School should default. As a nonprofit organization, Fortune School anticipates that the County Office's liability will be limited as long as the county office of education performs its oversight functions, according to law.

Communication and Notices

All official communication between Fortune School and the Sacramento County Office of Education shall be sent via first class mail or other appropriate means to Fortune School's President/CEO and the Superintendent of the Sacramento County Office of Education, at the following locations.

Fortune School of Education
2890 Gateway Oaks Drive, #100
Sacramento, CA 95833

Office of the Superintendent
Sacramento County Office of Education
10474 Mather Boulevard
P.O. Box 269003
Sacramento, CA 95826-9003

Hardy Brown College Prep

County	San Bernardino
District	<u>San Bernardino City Unified</u>
School	Hardy Brown College Prep
CDS Code	36 67876 0122317
School Address	655 West 2nd St. San Bernardino, CA 92410-3210 <u>Google Map</u> 
Mailing Address	2890 Gateway Oaks Dr., Ste. 100 Sacramento, CA 95833-4327
Phone Number	[REDACTED]
Fax Number	[REDACTED]
Email	[REDACTED]
Web Address	<u>www.fortuneschool.us</u> 
Administrator	Toiya Allen Principal [REDACTED] Bonnie Bensen Chief Financial Officer [REDACTED]
Chief Business Official	Bonnie Bensen Chief Financial Officer [REDACTED]
Status	Active
Open Date	August 18, 2010
School Type	Elementary Schools (Public)
Educational Program Type	Traditional

Low Grade	K
High Grade	8
Public School	Yes
Charter	Yes
Charter Number	1155
Charter Funding Type	Directly funded
Magnet	No
Year Round	Yes
Virtual Instruction	Not Virtual
Multilingual Instruction	No
NCES/Federal School ID	12796
CDS Coordinator (Contact for Data Updates)	Cecil Wright [REDACTED] Update Data Request

DISCLAIMER: The California School Directory and related public school and district data files (collectively referred to as the "Directory"), contain information about California schools, districts, and school/district administrators that is voluntarily self-reported by local education agencies (LEAs) to the California Department of Education (CDE) as a public convenience. Because the information is voluntarily self-reported, the Directory does not contain information for every LEA and the information that is in the Directory may be outdated or have errors, omissions, typos and other inaccuracies. Therefore, information, or the absence of information, in the Directory should not be relied upon for any purpose and should be used only to contact the LEA. The CDE makes no representation or warranty, express or implied, with respect to Directory information.

For information regarding LEA accreditation, please visit the US Department of Education's [Accreditation and Quality Assurance](#)  web page.

Questions: CDS Administration | [REDACTED]

Fortune

County	Sacramento
District	<u>Sacramento County Office of Education</u>
School	Fortune
CDS Code	34 10348 0136275
School Address	6829 Stockton Blvd., Ste. 380 Sacramento, CA 95823-2395 Google Map 
Mailing Address	2890 Gateway Oaks Dr., Ste. 100 Sacramento, CA 95833
Phone Number	[REDACTED]
Fax Number	[REDACTED]
Email	[REDACTED]
Web Address	www.fortuneschool.org 
Administrator	Bonnie Bensen Chief Financial Officer [REDACTED]
Chief Business Official	Bonnie Bensen Chief Financial Officer [REDACTED]
Status	Active
Open Date	August 17, 2017
School Type	K-12 Schools (Public)
Educational Program Type	Traditional
Low Grade	K
High Grade	12
Public School	Yes PR/Award # S282M200010

Charter	Yes
Charter Number	1313
Charter Funding Type	Directly funded
Magnet	No
Year Round	Yes
Virtual Instruction	Not Virtual
Multilingual Instruction	No
NCES/Federal School ID	14070
CDS Coordinator (Contact for Data Updates)	Trisha Odin [REDACTED] Update Data Request

DISCLAIMER: The California School Directory and related public school and district data files (collectively referred to as the "Directory"), contain information about California schools, districts, and school/district administrators that is voluntarily self-reported by local education agencies (LEAs) to the California Department of Education (CDE) as a public convenience. Because the information is voluntarily self-reported, the Directory does not contain information for every LEA and the information that is in the Directory may be outdated or have errors, omissions, typos and other inaccuracies. Therefore, information, or the absence of information, in the Directory should not be relied upon for any purpose and should be used only to contact the LEA. The CDE makes no representation or warranty, express or implied, with respect to Directory information.

For information regarding LEA accreditation, please visit the US Department of Education's [Accreditation and Quality Assurance](#)  web page.

Questions: CDS Administration | [REDACTED]

Hardy Brown College Prep

County	San Bernardino
District	<u>San Bernardino City Unified</u>
School	Hardy Brown College Prep
CDS Code	36 67876 0122317
School Address	655 West 2nd St. San Bernardino, CA 92410-3210 <u>Google Map</u> 
Mailing Address	2890 Gateway Oaks Dr., Ste. 100 Sacramento, CA 95833-4327
Phone Number	[REDACTED]
Fax Number	[REDACTED]
[REDACTED]	[REDACTED].us
Web Address	<u>www.fortuneschool.us</u> 
Administrator	Toiya Allen Principal [REDACTED] Bonnie Bensen Chief Financial Officer [REDACTED]
Chief Business Official	Bonnie Bensen Chief Financial Officer [REDACTED]
Status	Active
Open Date	August 18, 2010
School Type	Elementary Schools (Public)
Educational Program Type	Traditional

Low Grade	K
High Grade	8
Public School	Yes
Charter	Yes
Charter Number	1155
Charter Funding Type	Directly funded
Magnet	No
Year Round	Yes
Virtual Instruction	Not Virtual
Multilingual Instruction	No
NCES/Federal School ID	12796
CDS Coordinator (Contact for Data Updates)	Cecil Wright [REDACTED]

DISCLAIMER: The California School Directory and related public school and district data files (collectively referred to as the "Directory"), contain information about California schools, districts, and school/district administrators that is voluntarily self-reported by local education agencies (LEAs) to the California Department of Education (CDE) as a public convenience. Because the information is voluntarily self-reported, the Directory does not contain information for every LEA and the information that is in the Directory may be outdated or have errors, omissions, typos and other inaccuracies. Therefore, information, or the absence of information, in the Directory should not be relied upon for any purpose and should be used only to contact the LEA. The CDE makes no representation or warranty, express or implied, with respect to Directory information.

For information regarding LEA accreditation, please visit the US Department of Education's [Accreditation and Quality Assurance](#)  web page.

Questions: CDS Administration | [REDACTED]



HARDY BROWN COLLEGE PREP

655 West 2nd Street
 San Bernardino, CA 92415
 [REDACTED]

Principal: Toiya Allen
 Assistant Principal: Terica Ned-Pelt
 Secretary: Mr. G
 Parent Liaison: N/A



FORTUNE SCHOOL

6829 Stockton Blvd. #380
 Sacramento, CA 95823
 [REDACTED]

Principal: Kim Howard
 Office Manager: Crystal Sims
 Secretary: Janet Velasquez
 Parent Liaison: Esperanza Johnson



WILLIAM LEE COLLEGE PREP

3300 Stockton Blvd.
 Sacramento, CA 95820
 [REDACTED]

Principal: Joseph Gambino
 Office Manager: Vanesha Rosseau
 Secretary: Marlene Zamora
 Parent Liaison: Evelyn Hernandez



ALAN ROWE COLLEGE PREP

9424 Big Horn Blvd.
 Elk Grove, CA 95758
 [REDACTED]

Principal: Sara Williams, Beverly Bryant
 Office Manager: Patrice Flemons
 Secretary: Parlisha Watts-Andrews
 Parent Liaison: Ashley Randolph



EPHRAIM WILLIAMS COLLEGE PREP

4545 9th Avenue
 Sacramento, CA 95820
 [REDACTED]

Principal: Melissa Javinar, Marcus Atkins
 Office Manager: Venesha Rosseau
 Secretary: Robisha Collins
 Parent Liaison: Evelyn Hernandez



HAZEL MAHONE COLLEGE PREP

3750 Rosin Court
 Sacramento, CA 95834
 [REDACTED]

Principal: Tamara Williams
 Office Manager: Roze Murphy
 Secretary: Chevelle Lee
 Parent Liaison: N/A



REX & MARGARET FORTUNE EARLY COLLEGE HIGH

9270 Bruceville Road
 Elk Grove, CA 95758
 [REDACTED]

Principal: Odisa Nyong
 Assistant Principal: Janine Knill
 Office Manager: Kristy Nong
 Parent Liaison: N/A

Summary Analysis: Fortune 2019 CAASPP Results

CENTER FOR STUDENT ASSESSMENT AND PROGRAM ACCOUNTABILITY

Sacramento
Office of Education **County**

PR/Award # S282M200010

WILD.21.
Page 24.

Summary Analysis: Fortune 2019 CAASPP Results

English Language Arts/Literacy

Overall (p.4)

- Fortune students perform less well in English language arts/literacy than students in Sacramento County or California.
- The rate of improvement for Fortune students in ELA over the past four years has doubled that of the state and nearly doubled that of the county (14 percentage point increase for Fortune students compared to a 7 percentage point increase for the state and 8 point increase for the county).
- In 2019, the performance gap between Fortune students and students in the county and state is less than half of what it was four years prior. In 2015, there was a 10 percentage point difference between the performance of Fortune students and all students in the county; in 2019, that difference was 4 percentage points. Likewise, the 13 point difference between Fortune students and student statewide in 2015 shrank to 6 percentage points in 2019.

Claim (pp.5-6)

- Fortune students perform about as well as students in the county and the state on all four ELA claims: reading, writing, listening, and research & inquiry.
- From 2015 to 2019, Fortune students significantly improved their performance on all four ELA claims, outgaining their peers county- and statewide.
- The most dramatic gains have been in the reading claim, where Fortune students have improved 22 percentage points over the past five years, compared to gains of 6 percentage points for the county and the state. Fortune has closed the achievement gap in this area, climbing from 13 percentage points below the county and 14 points below the state to exceeding the county by 3 points and the state by 2 points.
- When looking at performance of Fortune students compared to students in the four main feeder school districts – Elk Grove, Natomas, Sacramento City, and Twin Rivers – Fortune students perform at higher levels than some and at lower levels than some, with performance varying by Fortune school site. Students at the namesake Fortune School site outperformed all feeder districts, as well as the county and the state, in all four ELA claims.

Grade (p.7)

- The performance of Fortune students is strongest in grade 5, grade 7, and grade 8, where Fortune students perform at or above the countywide average. More than half of Fortune students at these grade levels met or exceeded standards in ELA.
- Grade 7 has shown improvement over each of the last three years, increasing from 23% of students meeting or exceeding standards in 2016 to 51% in 2019.
- Grade 8 showed the greatest single-year gain. The grade level improved by 34 percentage points, from 22% of students meeting or exceeding standards in 2018 to 56% in 2019.
- Grade 3 rose 13 percentage points in 2019 to reach 49% of students at met or exceeded standards, which matched the performance at the state and exceeded the performance at the county.
- Grade 6 has had varied performance, dipping 5 percentage point in 2016, then rising 19 points over 2017 and 2018 before dipping 13 points in 2019, resulting in a net gain of 1 percentage point since 2015.

Student Group (pp.8-9)

- Fortune has shown improvement greater than the county and the state for most of its major student groups, including students who are African American, Hispanic, economically disadvantaged, and those with disabilities.
- African American and Hispanic students at Fortune have outperformed their peers countywide for each of the past five years and have outperformed their peers statewide for the past three years. In 2019, 40% of African American students at Fortune met or exceeded standards, compared to 29% at the county and 33% at the state. Among Hispanic students, 53% at Fortune met or exceeded standards, compared to 39% at the county and 41% at the state.
- African American students at four of the five Fortune schools also outperformed their peers at the county, state, and at four main feeder districts. At the namesake Fortune School, 62% of African American students met or exceeded standards; the closest performance at a feeder district was 34% meeting or exceeding standards at Elk Grove Unified.
- Hispanic students at all five of the Fortune schools outperformed their peers at the county, state, and three of the four main feeder districts. At the namesake Fortune School, 68% of Hispanic students met or exceeded standards; the closest performance at a feeder district was 44% meeting or exceeding standards at Elk Grove Unified.
- Performance for the relatively small population of EL students at Fortune has varied considerably over the last five years; however, in 2019 this group improved from 13% met or exceeded standards to 21%, compared to the stagnant performance of ELs at the county (12%) and the state (13%).
- Economically disadvantaged students at Fortune outperformed their peers at the county the state, and most feeder districts. At Fortune, 44% of economically disadvantaged students met or exceeded standards, compared to 37% at the county and 39% at the state.

Mathematics

Overall (p.10)

- Fortune students performed above county and statewide averages.
- The rate of improvement for Fortune students from 2015 to 2019 is more than three times that of students countywide and statewide. Fortune students improved 24 percentage points over the last four years compared to more moderate increases of 5 percentage points countywide and 7 percentage points statewide.

Claim (pp.11-12)

- The growth in performance is also seen on the mathematics claims. Fortune students performed better than the county and the state on the Concepts & Procedures and Problem Solving, Modeling and Data Analysis claims and similar on the Communicating Reasoning claim.
- There has been notable improvement in claim performance by Fortune students since 2015. Fortune students improved in the Problem Solving, Modeling, & Data Analysis claim by 19 percentage points over the last four years when students countywide and statewide showed little change. Similar results are evident for the Communicating Reasoning claim.
- When comparing the performance of Fortune students to those in feeder districts, Fortune performs above all of the feeder districts on two claims: Concepts & Procedures and Problem Solving, Modeling and Data Analysis. On the third claim, Communicating Reasoning, Fortune students outperformed three of the four feeder districts.

Grade (p.13)

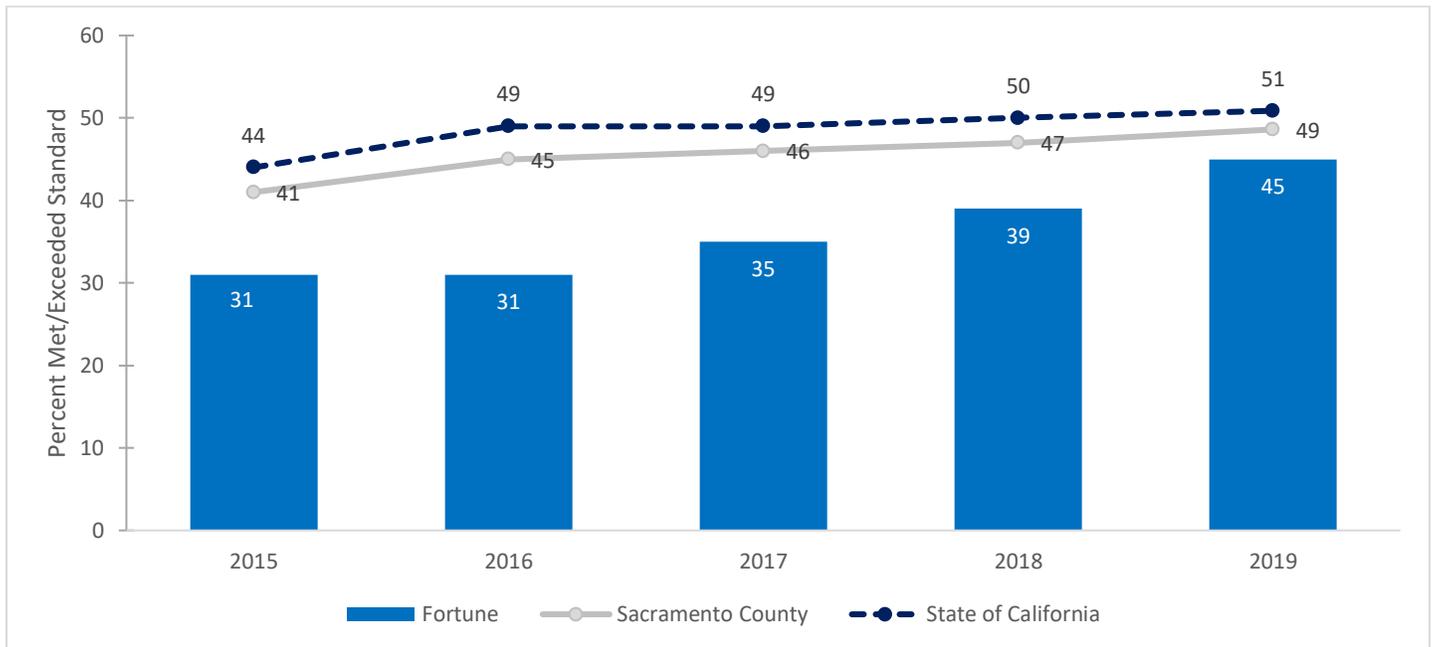
- The performance of Fortune students was strongest in grade 3 where Fortune students perform 15 percentage points above the countywide average (62% of Fortune students are meeting or exceeding standards compared to 47% of students countywide). Grade 3 students improved 31 percentage points (from 31% to 62% meeting or exceeding standards) in the last five years.
- There has also been substantial improvement in the scores for grade 5 students, with improvement of 46 percentage points from 2015 to 2019. This improvement compares to a 8 percentage point improvement for grade 5 students statewide.
- Gaps exist between the overall performance of students in grades 6, 7, and 8 at Fortune and students in those grades throughout the county and statewide.
- Performance of students in grade 6 lags most substantially behind students in that same grade in the county and statewide. A total of 25% of grade 6 Fortune students met or exceeded standards in 2019 compared to 39% in the state.

Student Group (pp.14-15)

- Fortune has shown improvement greater than the county and the state for students who are African American, Hispanic or Latino, low income, and English Learners. Fortune students from these groups also performed at or above the county and state average.
- Thirty-nine percent of African American students at Fortune met or exceeded standards compared to 18% in the county and 21% statewide. Similar results are shown for Hispanic or Latino students. Fifty-eight percent of Hispanic or Latino students at Fortune met or exceeded standards compared to 27% in the county and 28% statewide.
- Performance for EL students has improved considerably over the last year. Thirty-nine percent of English Learners at Fortune met or exceeded standards compared to 13% in the county and 13% statewide.
- Students with disabilities is the lowest performing student group at Fortune; yet, the performance is above the county average and equal to the statewide average.

English-Language Arts

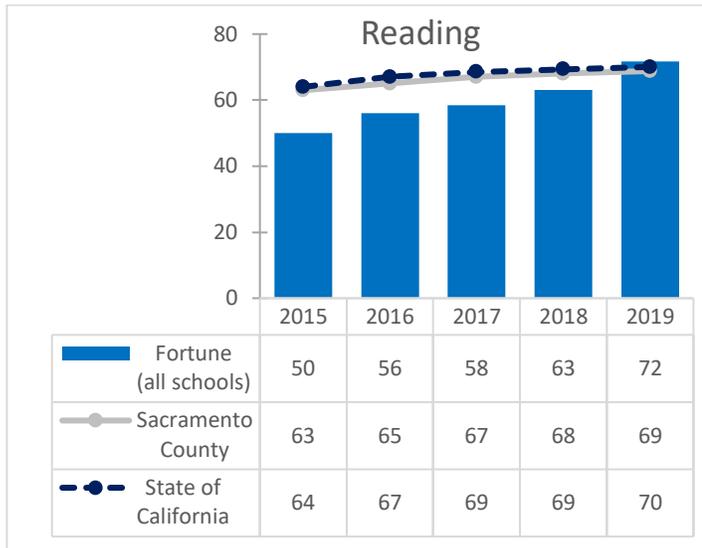
Since 2015, English-Language Arts scores for Fortune students have increased at a higher rate than for students regionally and statewide, and the performance gap between Fortune students and the peers statewide has narrowed.



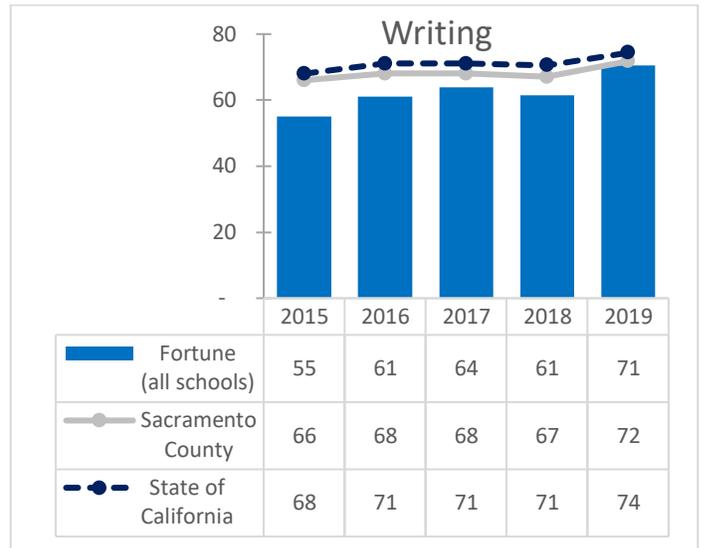
Entity	Growth (2015 to 2019)	2019 Difference from State	Change in Gap with State (2015 to 2019)
Fortune (All Schools)	+14	-6	Narrowed by 7 pts
Sacramento County	+8	-4	Narrowed by 1 pt
State of California	+7	--	--

Five-Year Claim Trend Data: English-Language Arts

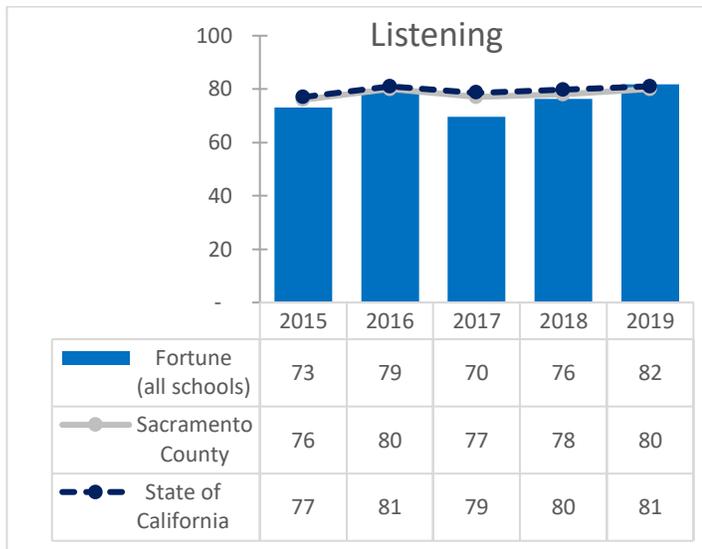
Percent of students scoring Near Standard and Above Standard on the claims comprising the Smarter Balanced English-Language Arts assessment



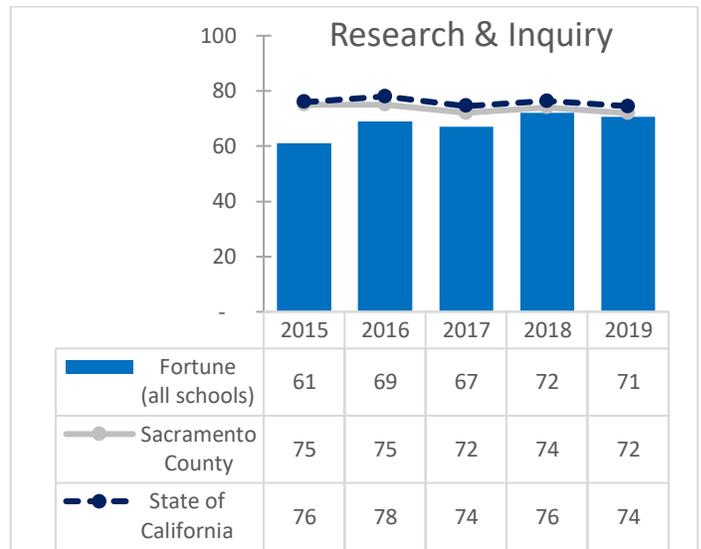
Growth: Fortune, 22 pts County, 6 pts State, 6 pts



Growth: Fortune, 16 pts County, 6 pts State, 6 pts



Growth: Fortune, 9 pts County, 4 pts State, 4 pts

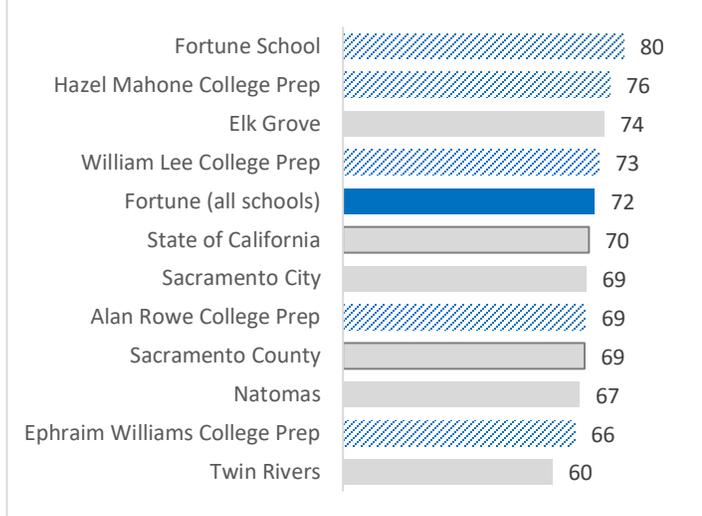


Growth: Fortune, 10 pts County, -3 pts State, -2 pts

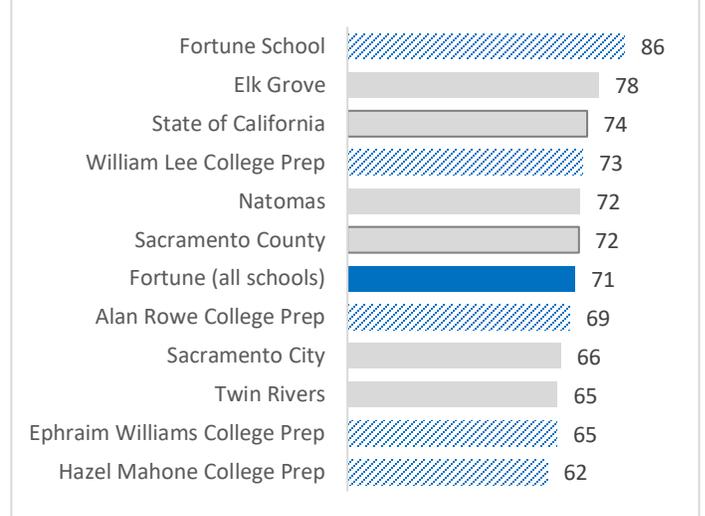
Comparison to Feeder Districts: 2019 English-Language Arts Claims

Similar to overall ELA, students at the Fortune School outperformed students at feeder districts on the claims comprising the 2019 Smarter Balanced English-Language Arts assessment; at least three out of every four students at the school scored Near Standard or Above Standard on Reading, Writing, Listening, and Research & Inquiry.

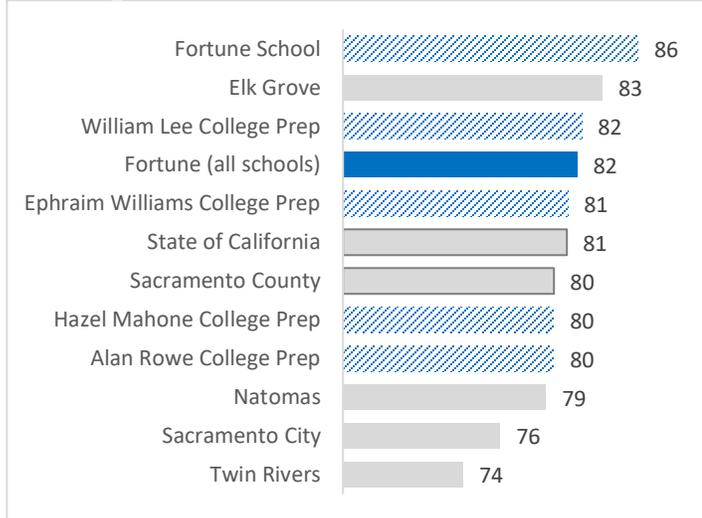
Reading



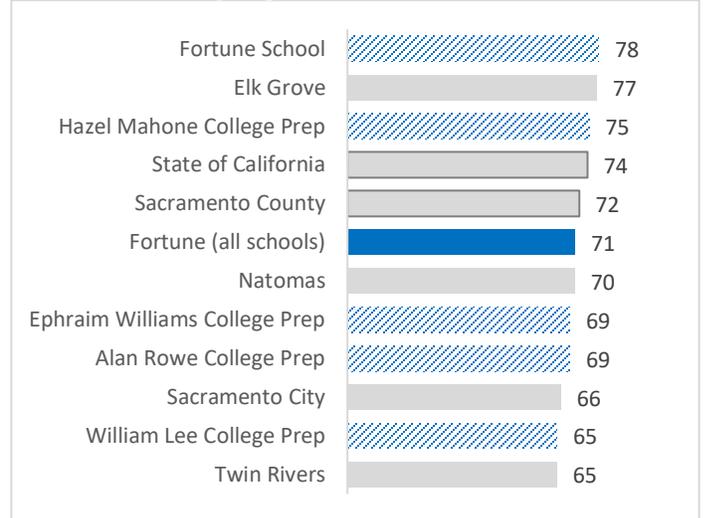
Writing



Listening

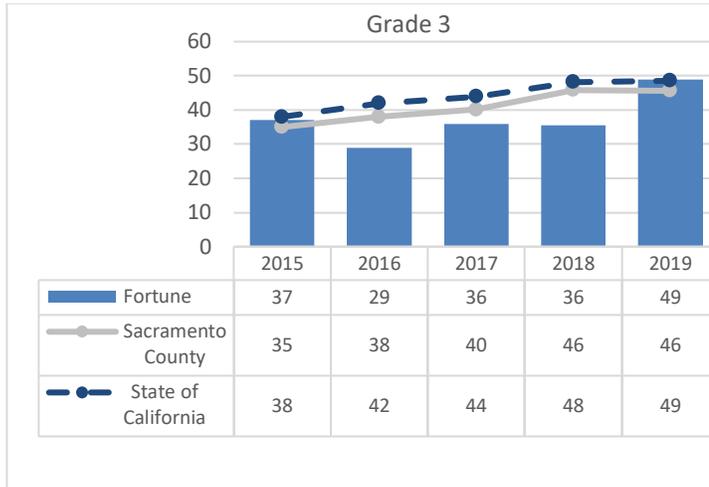


Research & Inquiry

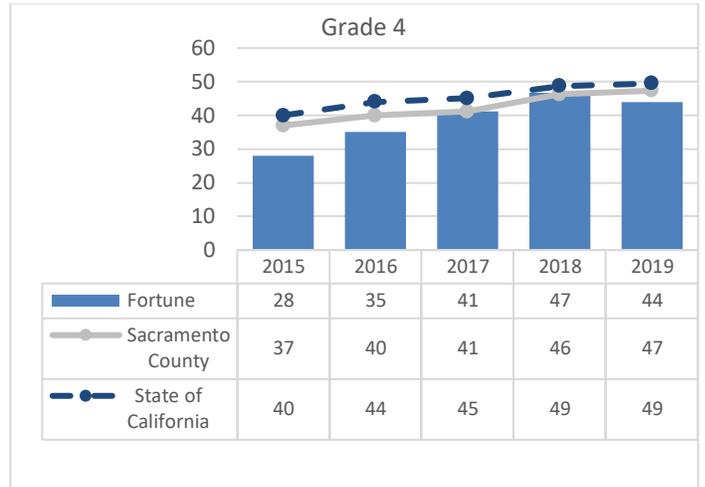


Grade Level Five-Year Trend Data: English-Language Arts

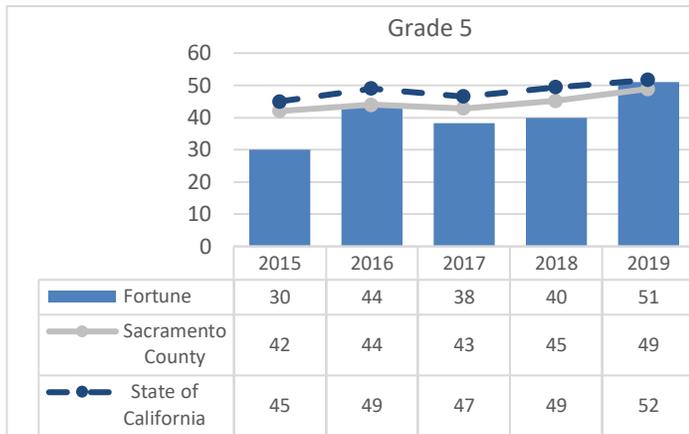
Percent of students Meeting or Exceeding Standard on the Smarter Balanced English-Language Arts assessment



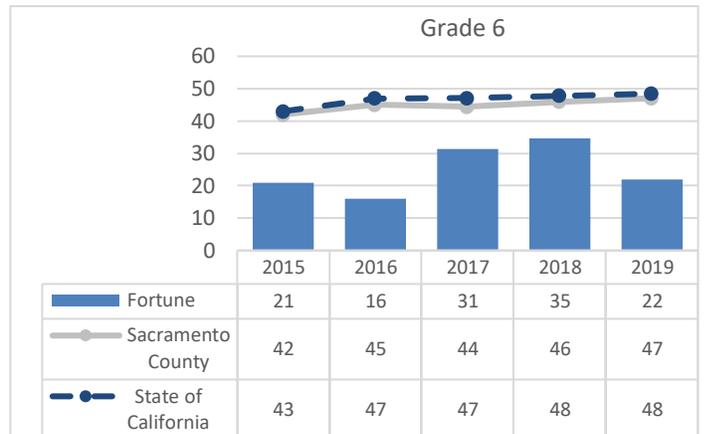
Growth: Fortune, 12 pts County, 11 pts State, 11 pts



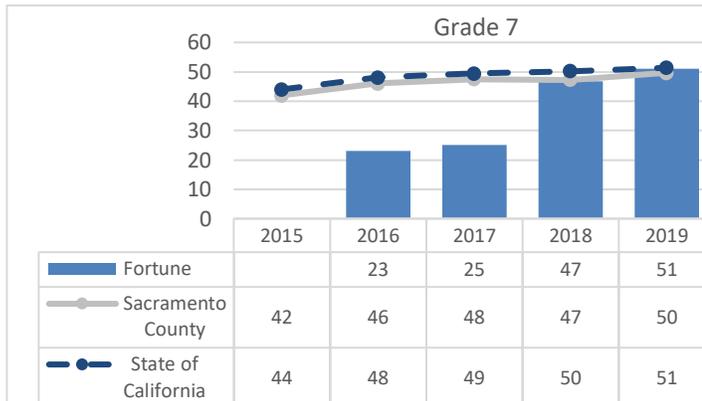
Growth: Fortune, 16 pts County, 10 pts State, 9 pts



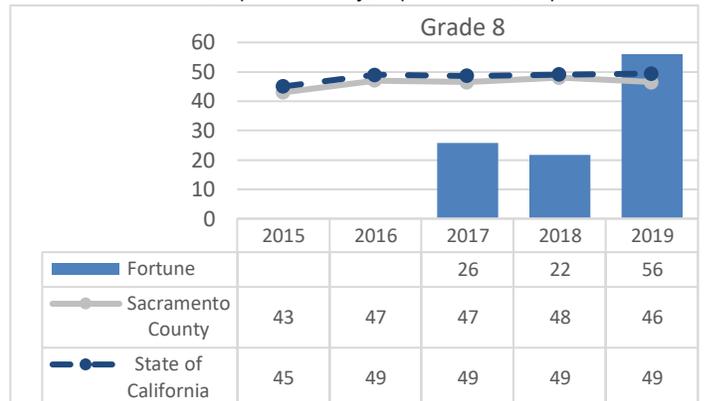
Growth: Fortune, 21 pts County, 7 pts State, 7 pts



Growth: Fortune, 1 pt County, 5 pts State, 5 pts



Growth (from 2016): Fortune, 28 pts County, 4 pts State, 3 pts



Growth (from 2017): Fortune, 30 pts County, -1 pt State, 0 pts

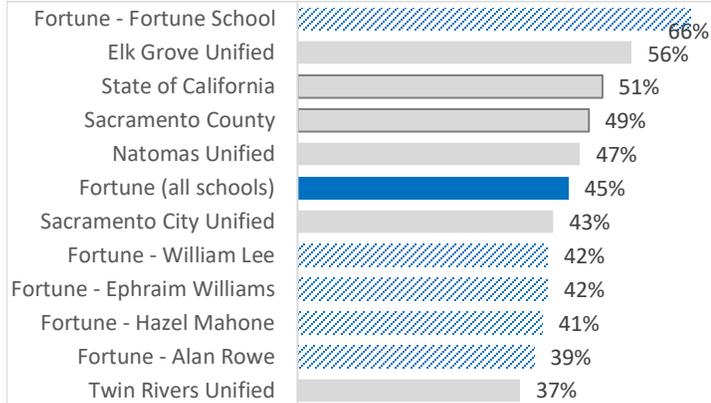
Comparison of Student Groups to Feeder Districts:

2019 English-Language Arts

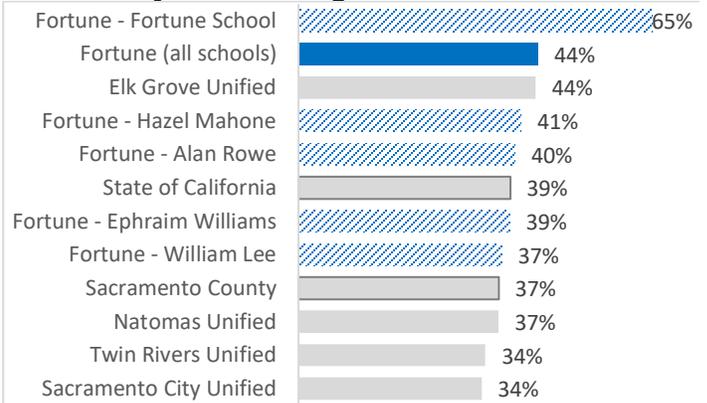
Percent of students Meeting or Exceeding Standard on Smarter Balanced English-Language Arts assessment

Aggregately, across all Fortune schools, students in all major student groups outperformed their peers in local feeder districts and statewide, though the overall performance (All Students) was slightly below the county average. At all five Fortune schools, Black/African American students and Hispanic students met/exceeded standards at a higher rate than their peers county- and statewide.

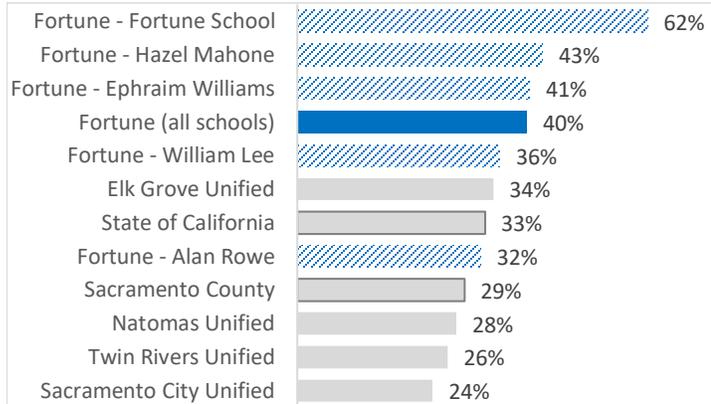
All Students



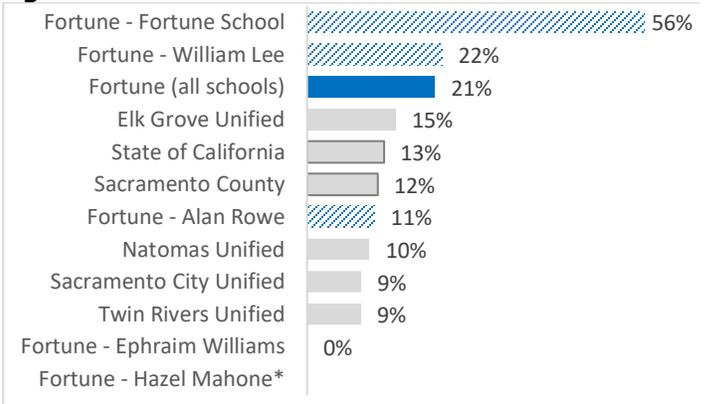
Economically Disadvantaged



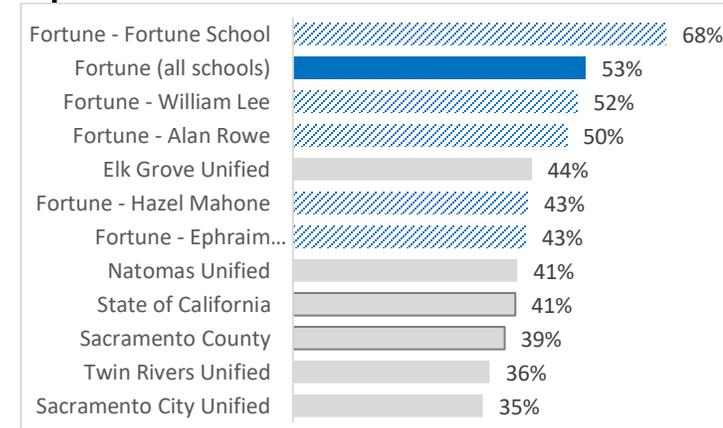
Black or African American



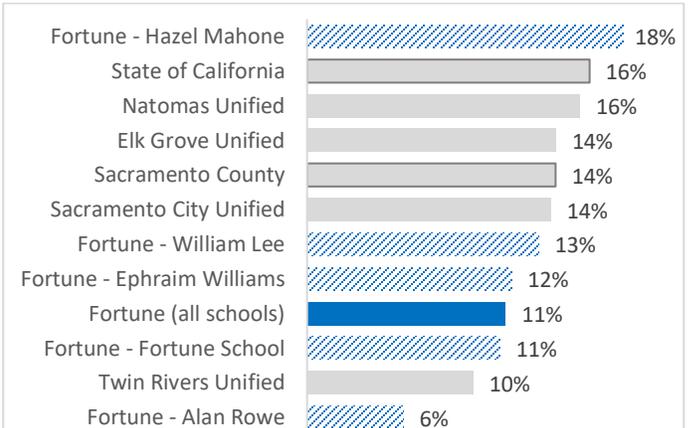
English Learner



Hispanic



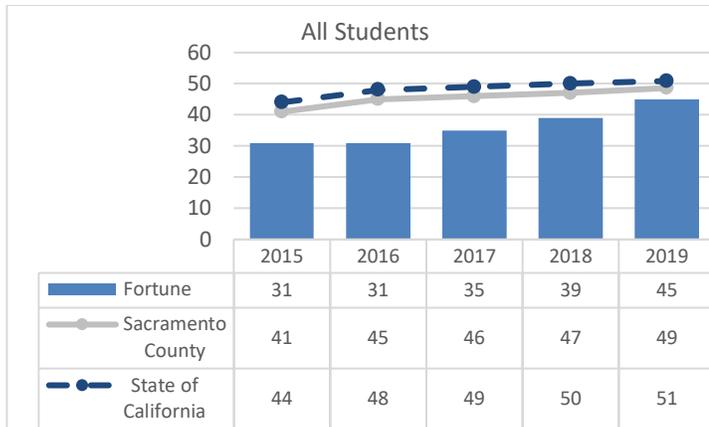
Students with Disabilities



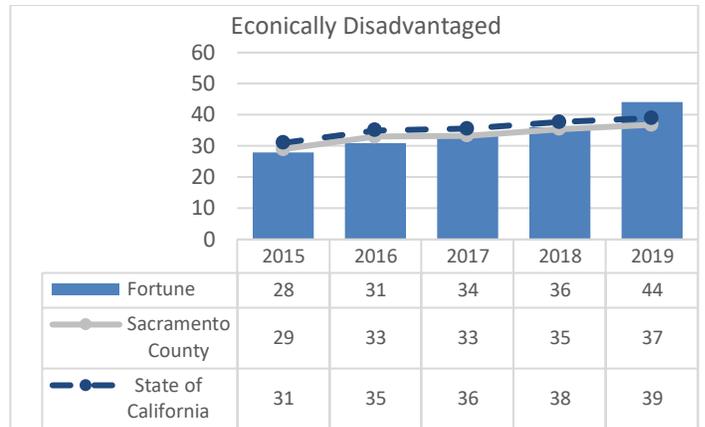
* fewer than 5 students

Student Group Five-Year Trend Data: English-Language Arts

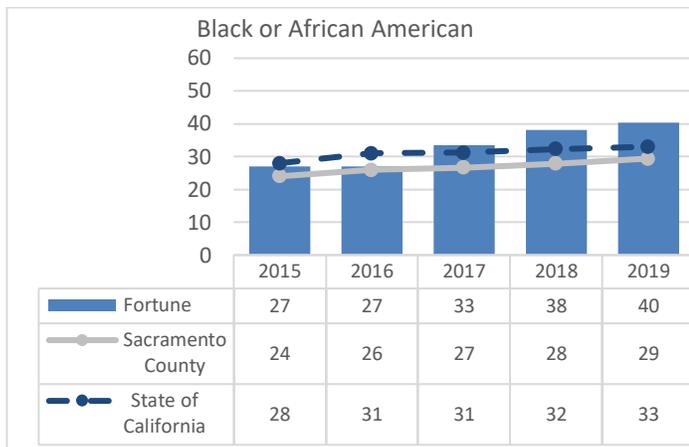
Percent of students Meeting or Exceeding Standard on the Smarter Balanced English-Language Arts assessment



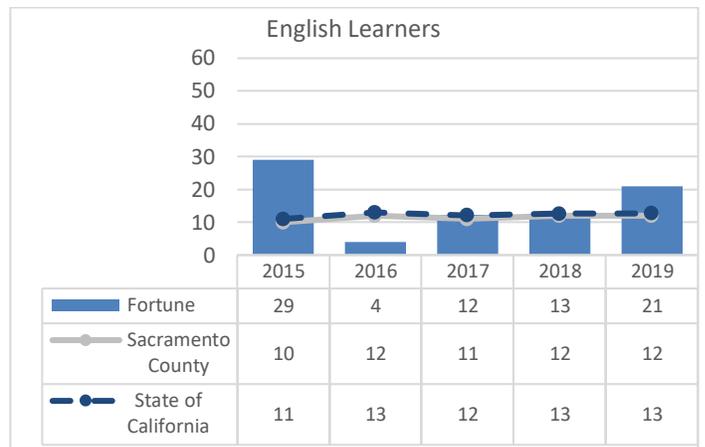
Growth: Fortune, 14 pts County, 8 pts State, 7 pts



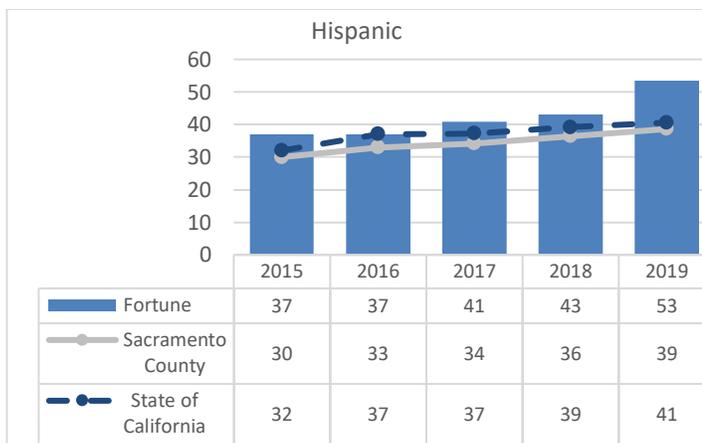
Growth: Fortune, 16 pts County, 8 pts State, 8 pts



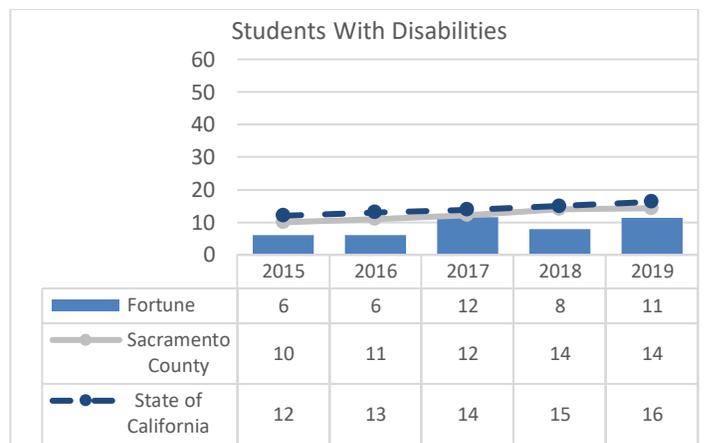
Growth: Fortune, 13 pts County, 5 pts State, 5 pts



Growth: Fortune, -8 pts County, 2 pts State, 2 pts



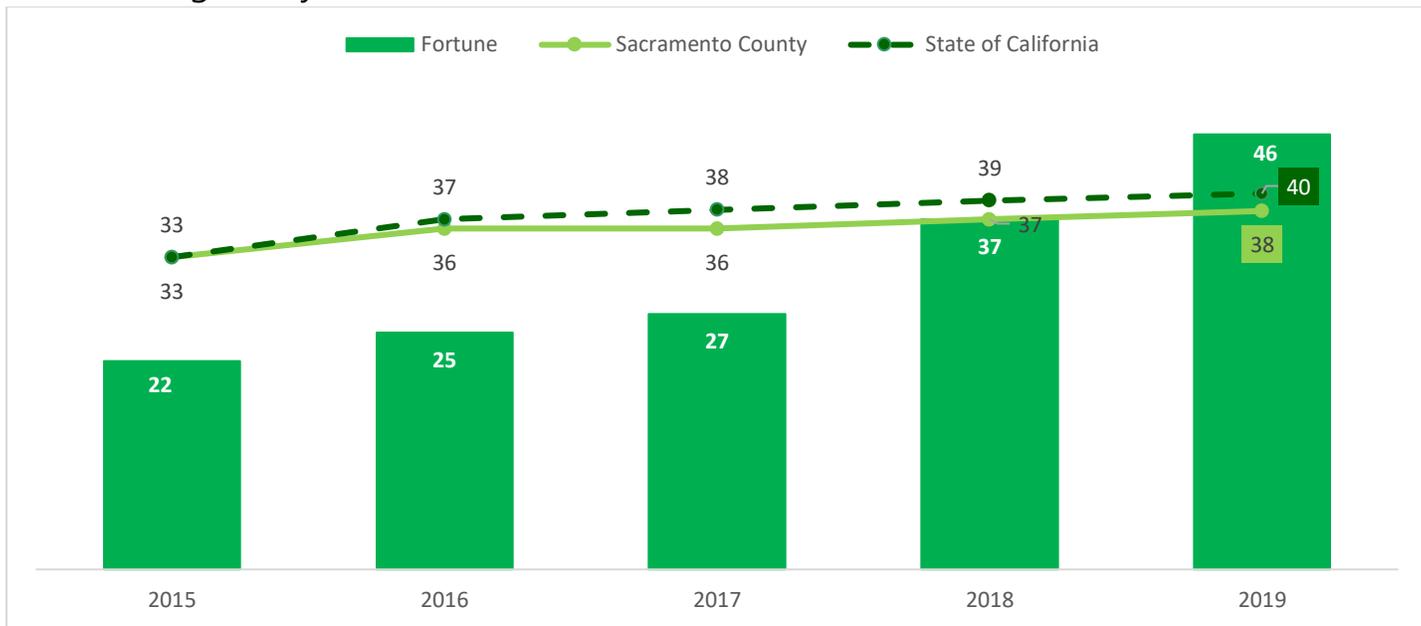
Growth: Fortune, 16 pts County, 9 pts State, 9 pts



Growth: Fortune, 5 pts County, 4 pts State, 4 pts

Mathematics

Since 2015, math scores for Fortune students have increased at a greater rate than for students regionally and statewide.

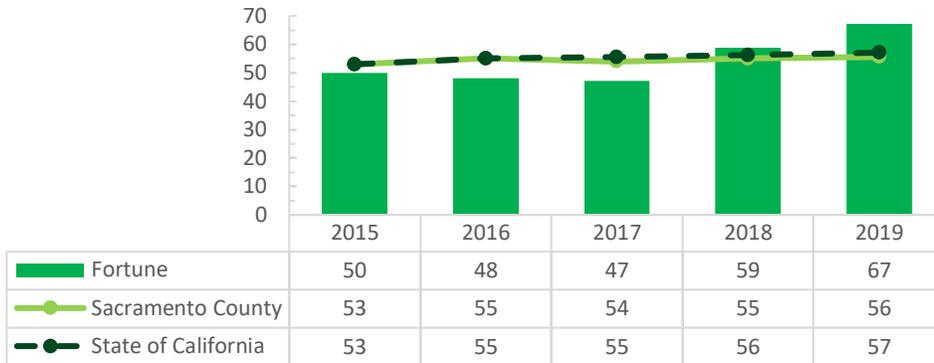


Entity	Growth (2015 to 2019)	2019 Difference from State	Change in Gap with State (2015 to 2019)
Fortune (All Schools)	+24	+6	Exceeded state rate by 6 points (gap reversed)
Sacramento County	+5	-2	Widened by 1 pt
State of California	+7	--	--

Five-Year Claim Trend Data: Mathematics

Percent of students scoring Near Standard and Above Standard on the claims comprising the Smarter Balanced Mathematics assessment

Concepts & Procedures



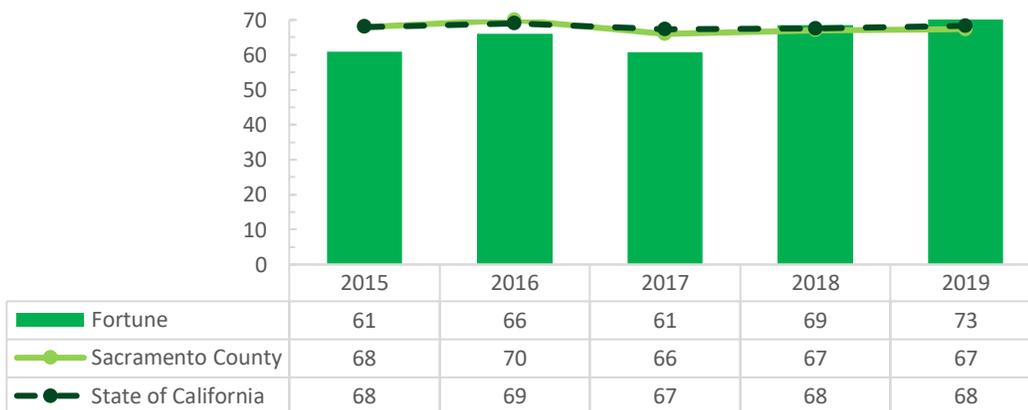
Growth: Fortune, 17 pts County, 3 pts State, 4 pts

Problem Solving, Modeling & Data Analysis



Growth: Fortune, 19 pts County, 1 pt State, 1 pt

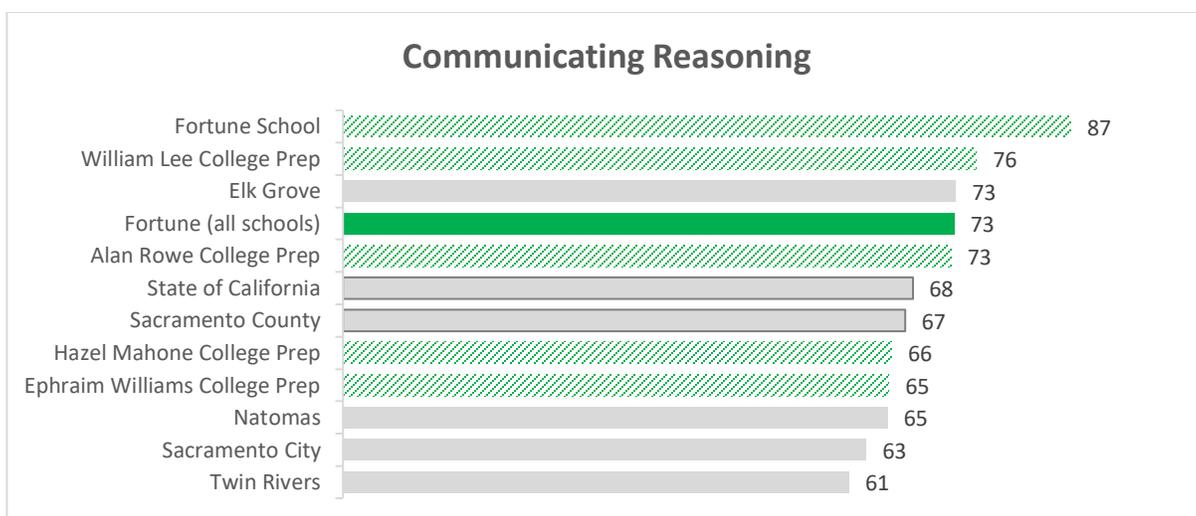
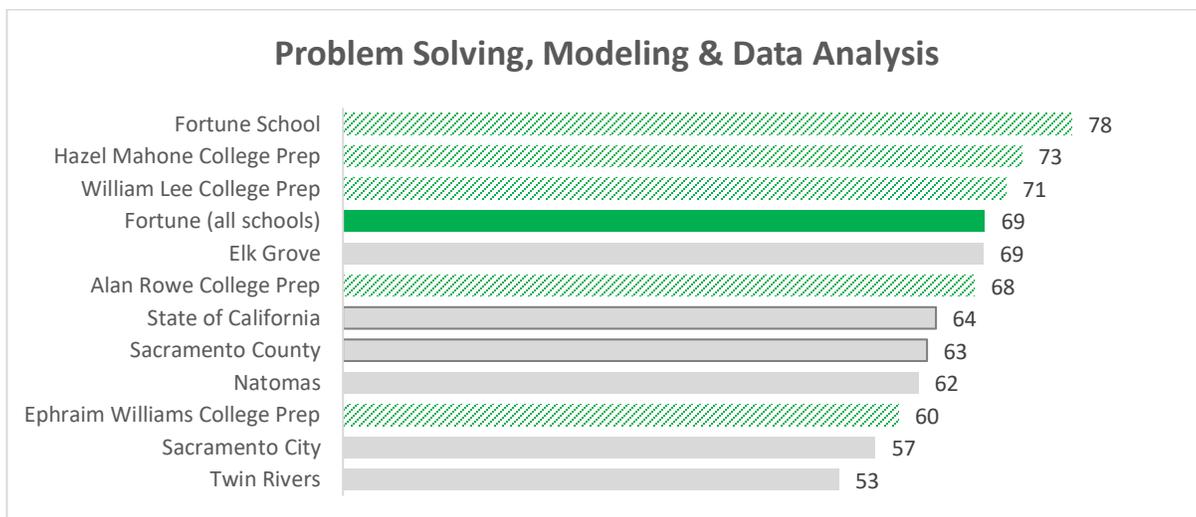
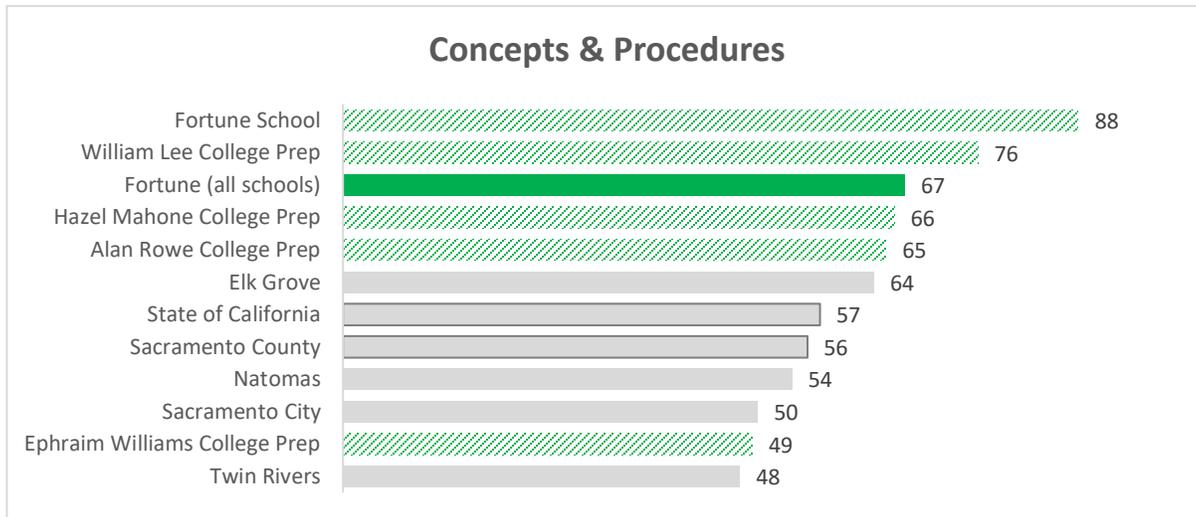
Communicating Reasoning



Growth: Fortune, 12 pts County, -1 pt State, 0 pts

Comparison to Feeder Districts: 2019 Mathematics Claims

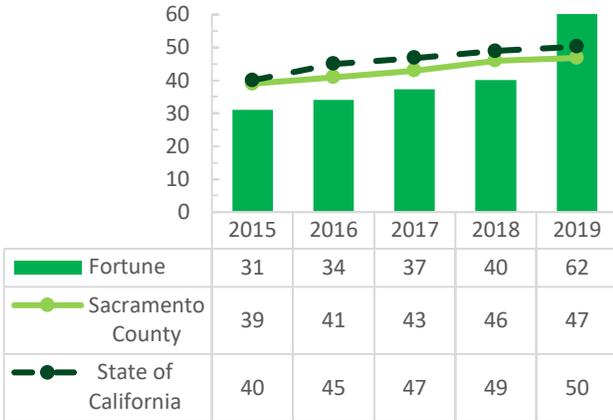
Percent of students scoring Near and Above Standard on the claims comprising the Smarter Balanced Mathematics assessment



Grade Level Five-Year Trend Data: Mathematics

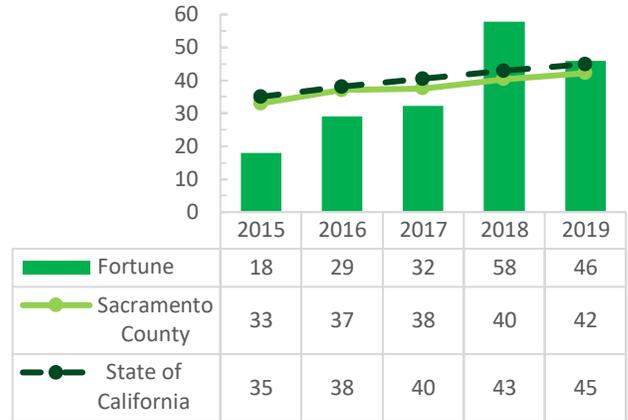
Percent of students scoring Met Standard and above on the Smarter Balanced Mathematics assessment

Grade 3



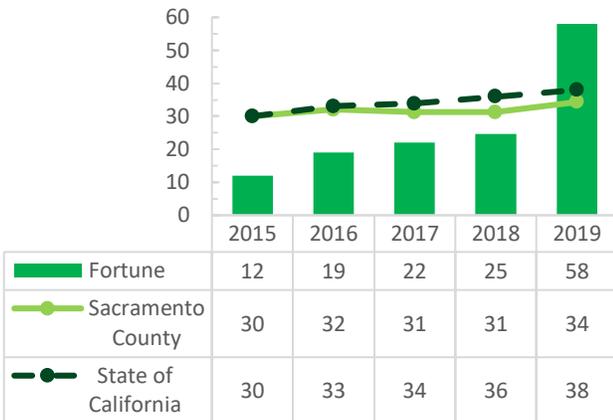
Growth: Fortune, 31 pts County, 8 pts State, 10 pts

Grade 4



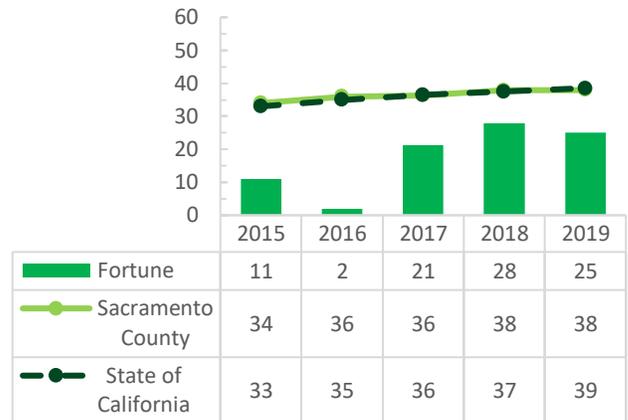
Growth: Fortune, 28 pts County, 9 pts State, 10 pts

Grade 5



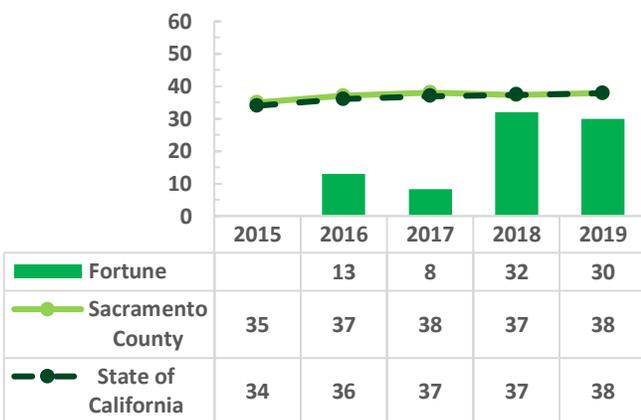
Growth: Fortune, 46 pts County, 4 pts State, 8 pts

Grade 6



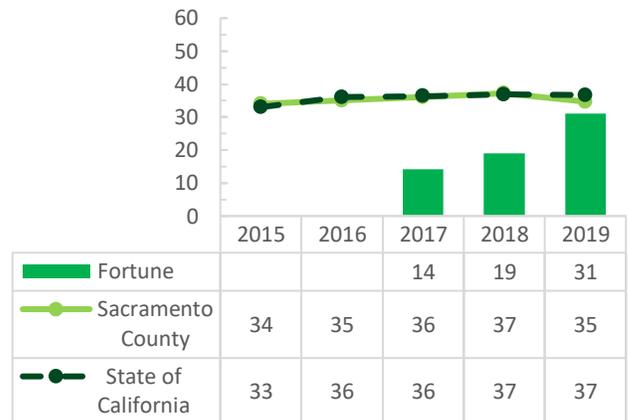
Growth: Fortune, 14 pts County, 4 pts State, 6 pts

Grade 7



Growth (from 2016): Fortune, 17 pts County, 1 pt State, 4 pts

Grade 8

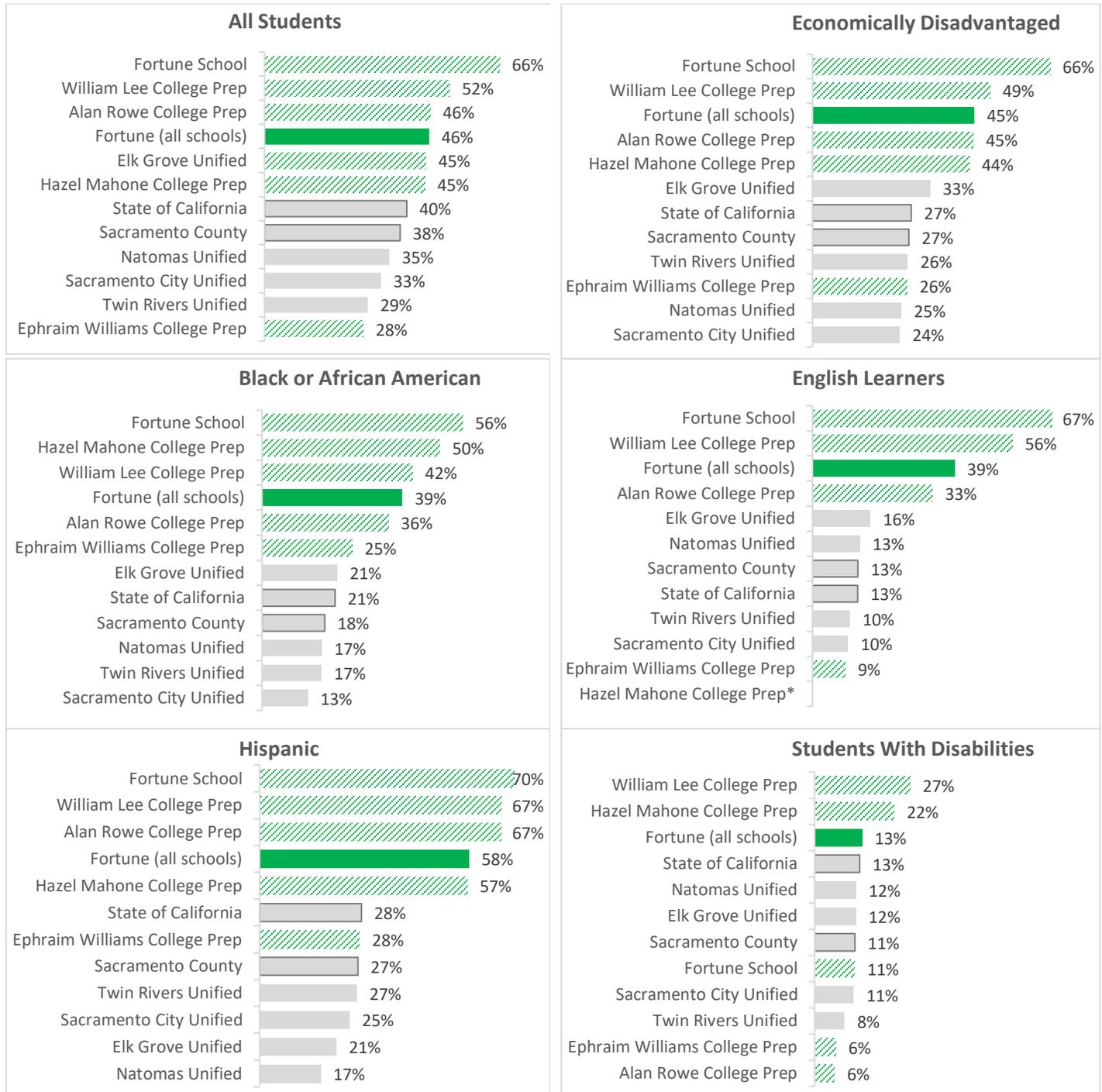


Growth (from 2017): Fortune, 17 pts County, -1 pt State, 1 pt

Comparison of Student Groups to Feeder Districts: 2019 Mathematics

Percent of students scoring Meeting or Exceeding Standard on Smarter Balanced Mathematics assessment

The performance of Fortune students in mathematics exceeded all four of the main feeder districts both for all students and for each of the five major student groups (African American, Hispanic, Economically Disadvantaged, English Learners, and Students With Disabilities).

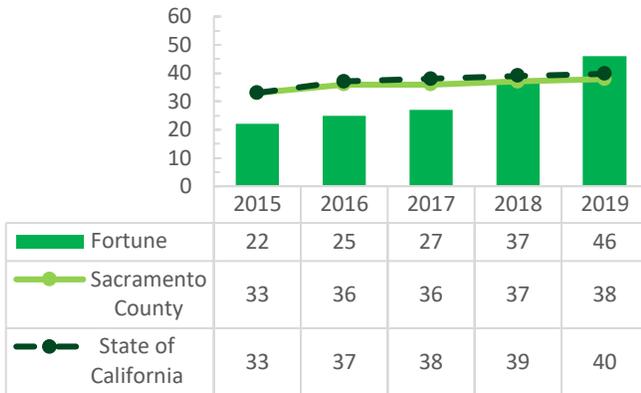


*fewer than 5 students

Student Group Five-Year Trend Data: Mathematics

Percent of students scoring Met Standard and above on Smarter Balanced Mathematics assessment

All Students



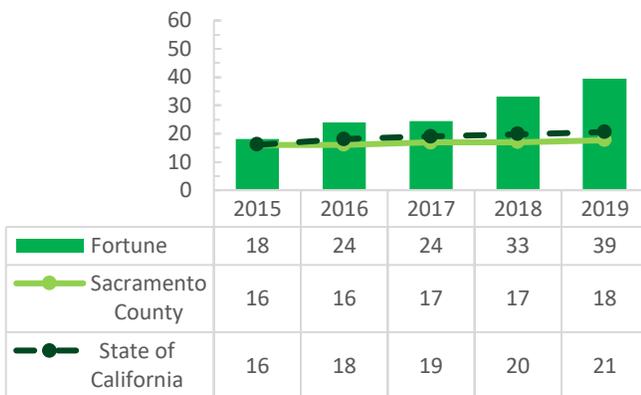
Growth: Fortune, 24 pts County, 5 pts State, 7 pts

Economically Disadvantaged



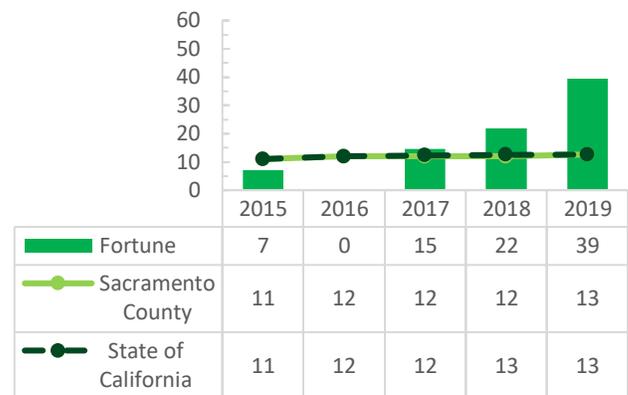
Growth: Fortune, 24 pts County, 4 pts State, 7 pts

Black or African American



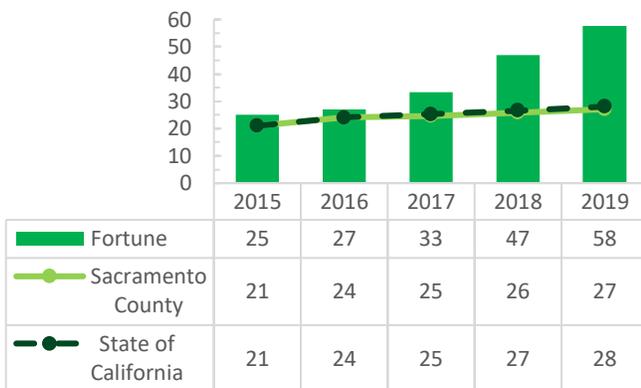
Growth: Fortune, 21 pts County, 2 pts State, 5 pts

English Learner



Growth: Fortune, 32 pts County, 2 pts State, 2 pts

Hispanic



Growth: Fortune, 33 pts County, 6 pts State, 7 pts

Students With Disabilities



Growth: Fortune, 4 pts County, 2 pts State, 4 pts

FORTUNE SCHOOL DATA ANALYSIS 2018-2019

Submitted by Fortune School of Education

Improving Outcomes for Our Scholars: Fortune School Data Analysis 2018-19

Fortune School System-wide Growth

Fortune School began serving students in Sacramento in the fall of 2011, beginning with 171 scholars. Fortune’s enrollment has risen to 1,456 scholars in 2019-20. Fortune scholars are mostly low-income (85%) and minority (99%). This report aims to transparently assess the extent to which Fortune School is achieving its mission to close the African American achievement gap in Sacramento County. In 2015-16 for ELA, 31% of scholars met or exceeded state standards. By 17-18, Fortune scholars had made 8 points of growth with 39% of scholars meeting or exceeding state standards. By 18-19, Fortune scholars, made an additional 6 points of growth with over 45% of scholars meeting or exceeding standards. **Fortune scholars grew by 14 points in English Language Arts over the last three school years.** In Math, Fortune scholars grew even more, increasing scores from 25% met or exceeded in 2015-16 to 37% in 2017-18 and 46% in 2018-19. **In Math, Fortune scholars grew by 21 points over the last three school years.** While encouraged by these levels of growth, we have more work to do. We are currently engaged in an array of efforts to improve the academic performance of our scholars, such as a focus on early literacy, implementing close reading protocols with our scholars and entering our second year with new math curriculum that matches the rigor of the Common Core. In addition, we continue to learn from other high performing schools throughout the nation. We are excited to continue to dedicate ourselves to this vital work.

School-level Growth

Each of our schools have shown growth over the last four-year period in both ELA and Math. As we dive deeper into school-level results, we again see promising trends. Over the last four years, every one of Fortune’s schools has posted growth in the percent of scholars meeting or exceeding state standards in at least one subject. **Four of Fortune’s five schools experienced double-digit growth in ELA and all five schools experienced double digit growth in Math.**

SBAC Results for ELA	2016	2017	2018	2019	Change
Fortune School	43	42	58	66	23
William Lee College Prep	29	28	26	42	13
Alan Rowe College Prep	34	42	33	39	5
Ephraim Williams College Prep	19	28	30	42	23
Hazel Mahone College Prep	n/a	31	41	41	10
Systemwide	31	35	39	45	14

Source: CDE CAASPP Research File, 10.23.19

SBAC Results for Math	2016	2017	2018	2019	Change
Fortune School	36	36	54	66	30
William Lee College Prep	21	26	36	52	31
Alan Rowe College Prep	23	28	27	46	23
Ephraim Williams College Prep	9	16	27	28	19
Hazel Mahone College Prep	n/a	23	35	45	22
Systemwide	25	27	37	46	21

Source: CDE CAASPP Research File, 10.23.19

Performance of our Grade Levels on SBAC

In addition to looking at data by school, we also like to look at performance by grade level to better understand where we are having greater success and where interventions are necessary.

SBAC Results for ELA

Grade	2016	2017	2018	2019	Change
3	29	36	36	48	19
4	35	41	47	45	10
5	44	38	40	56	12
6	16	31	35	28	12
7	23	25	47	56	33
8	n/a	26	22	55	29

Source: CDE CAASPP Research File, 10.23.19

SBAC Results for Math

Grade	2016	2017	2018	2019	Change
3	34	37	40	64	30
4	29	32	58	46	17
5	19	22	25	57	38
6	2	21	28	26	24
7	13	8	32	33	20
8	n/a	14	19	30	16

Source: CDE CAASPP Research File, 10.23.19

Analyzing the data by grade level shows a few important trends. First, in Math, Fortune School has grown in performance slowly and steadily over the past four years. Over this four-year period, all grade levels have grown by double digits, with exceptional performance in 3rd and 5th grades in Math. In Math, 4th grade experienced a drop between 2018 and 2019, but the overall performance is still showing strong growth over the last 4 years of 17 points.

In English Language Arts, the growth has been mostly moderate each year averaging 5 points of growth annually. In 5th and 8th grade, scholars made massive growth between 2017 and 2018 of 16 points and 33 points, respectively. This data also shows that our performance has fallen backwards in 4th and 6th grade. These are both focus areas for our Curriculum and Instruction team as we engage in our professional development during the 2019-20 school year.

Comparisons to Other Schools

In order to better understand school performance, it is useful to identify other measures of performance that not only look at absolute performance, but also account for demographic differences between schools. For each school in the state, we calculate two performance ranks so that we can compare our performance. These ranks are:

State Rank compares the school’s performance to other California schools using a measure of pure achievement.

Similar Schools Rank compares the school’s performance to a theoretical school serving identical demographics.

	State Rank 2018	State Rank 2019	Similar Schools Rank 2018	Similar Schools Rank 2019
ARCP	4	6	4	8
EWCP	2	4	8	10
FS	8	8	10	10
HMCP	5	6	7	10
WLCP	4	6	6	10

Using these ranks, we see that 4 of Fortune’s 5 schools have a Similar Schools rank of 10, the highest rank possible, which places these schools in the top 10 percent of all schools in the state when controlling for demographics. When comparing these ranks to 2018, all schools improved significantly, except for Fortune School which had already achieved the maximum score.

In addition to comparing our schools to one another, this data is extremely valuable for comparing to other schools statewide. The following list includes all of the schools in the state that serve greater than 50% African American, 50% low income students, have a similar schools rank of 10 and are in the top half of student performance in the state. **These schools are the highest performers around the state with African American students, and Fortune manages 4 of the top 8 schools in statewide.**

When looking at this same data in terms of math performance, Fortune School is the highest performing school in Math performance in the state.

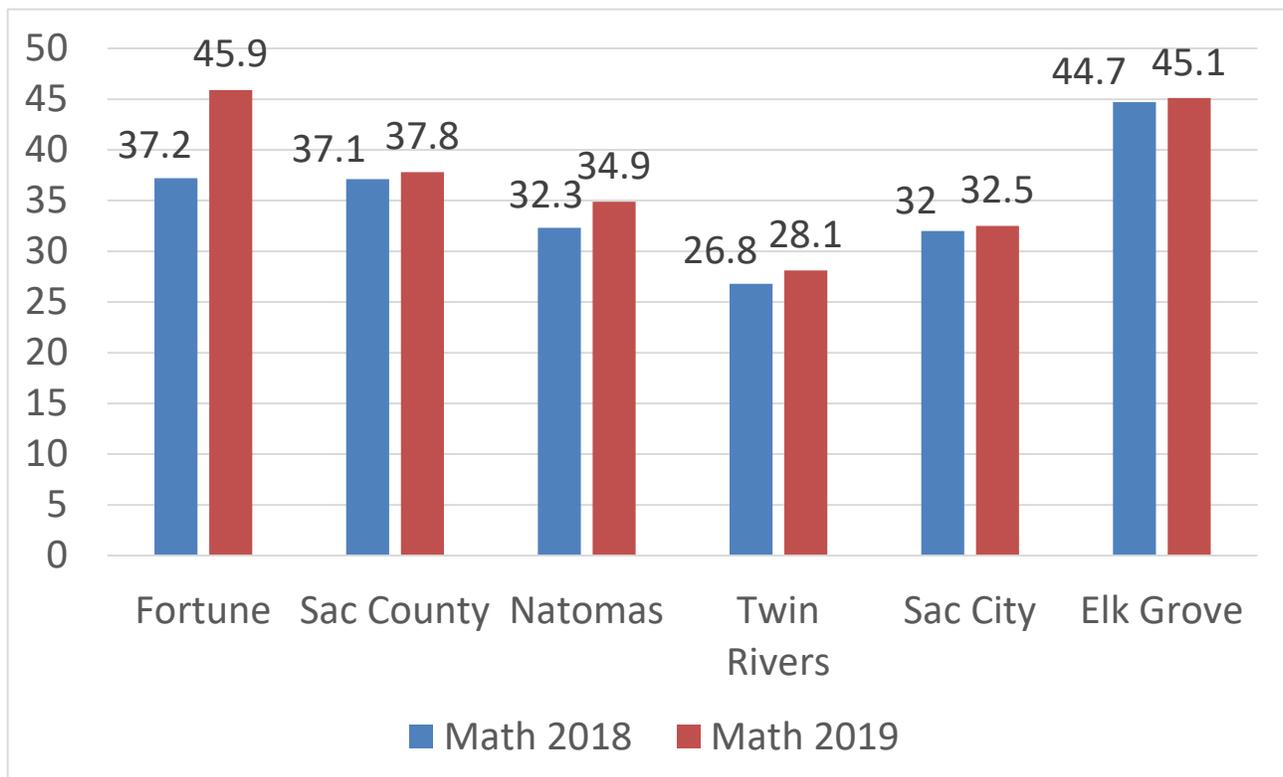
School Name	Similar Schools Rank	State Rank	ELA % Met	Math % Met
Cowan Avenue Elementary	10	9	69	65
Wilder's Preparatory Academy Charter	10	9	69	63
Wilder's Preparatory Academy Charter Middle	10	9	83	54
Fortune School	10	8	66	66
Hardy Brown College Prep	10	7	57	51
William Lee College Prep	10	6	42	52
Watts Learning Center	10	6	44	48
Hazel Mahone College Prep	10	6	41	45
CATCH Prep Charter High, Inc.	10	6	56	41
Today's Fresh Start-Compton	10	6	48	39
Aspire Berkley Maynard Academy	10	6	45	37
Pasadena Rosebud Academy	10	6	43	36
Sacramento Charter High	10	6	69	27
St. HOPE Public School 7	10	5	46	38
Broadacres Avenue Elementary	10	5	45	39
Malcolm X Academy	10	5	23	43

Source: CDE CAASPP Research File, 10.23.19 and Fortune analysis of State Ranks and SSM

Comparisons to Local Districts

As we compare our results to the school districts where our students would otherwise attend, we find that Fortune School is growing faster than all local districts, faster than the county, and faster than the state in both ELA and Math. When looking specifically at Math performance, we find that Fortune is now the highest performing school system in terms of Math performance, passing Elk Grove Unified this year.

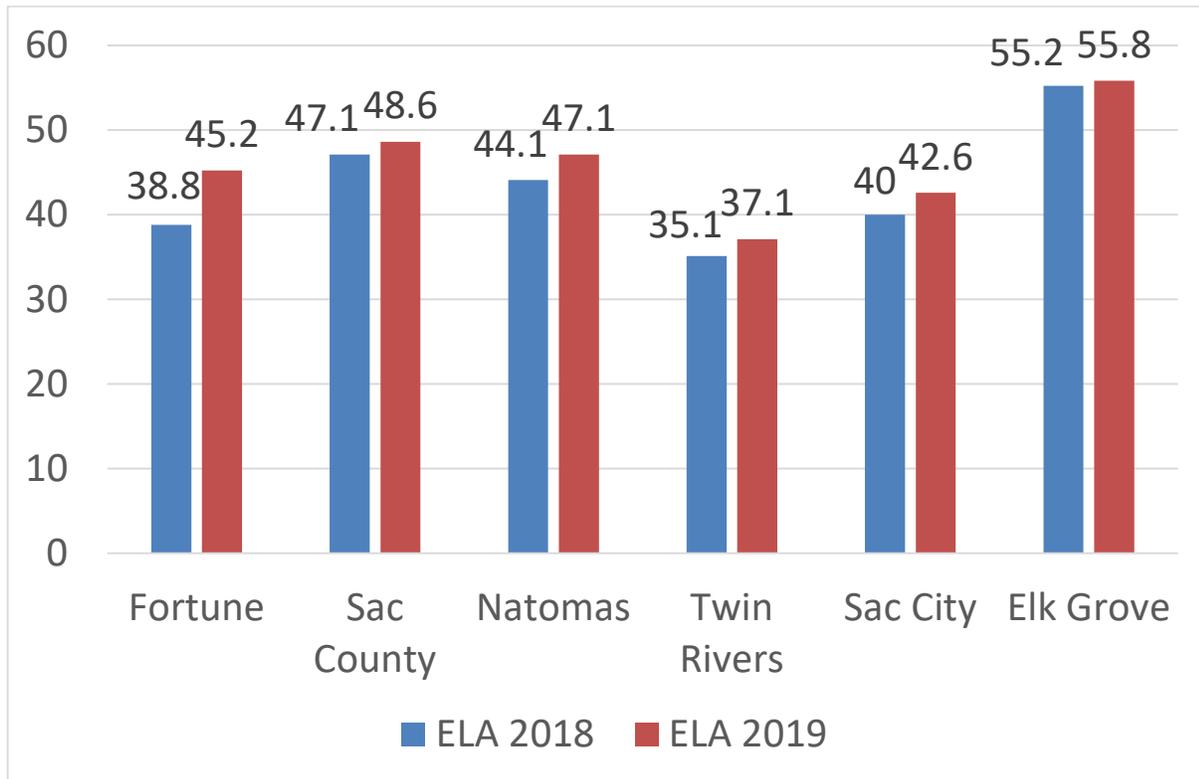
Math Performance 2017-18 to 2018-19



School	Math Growth
Fortune	8.7
Sac County	0.7
Natomas	2.6
Twin Rivers	1.3
Sac City	0.5
Elk Grove	0.4

Source: CDE CAASPP Website, 10.23.19

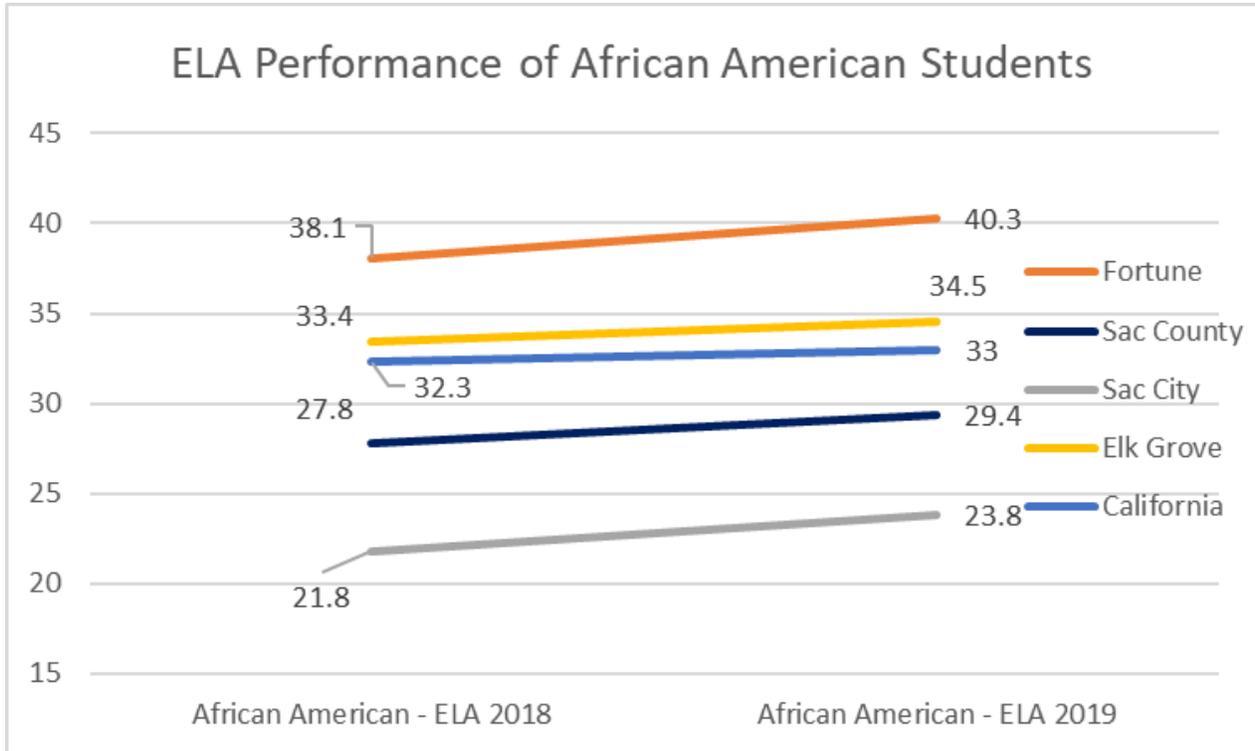
ELA Performance 2017-18 to 2018-19



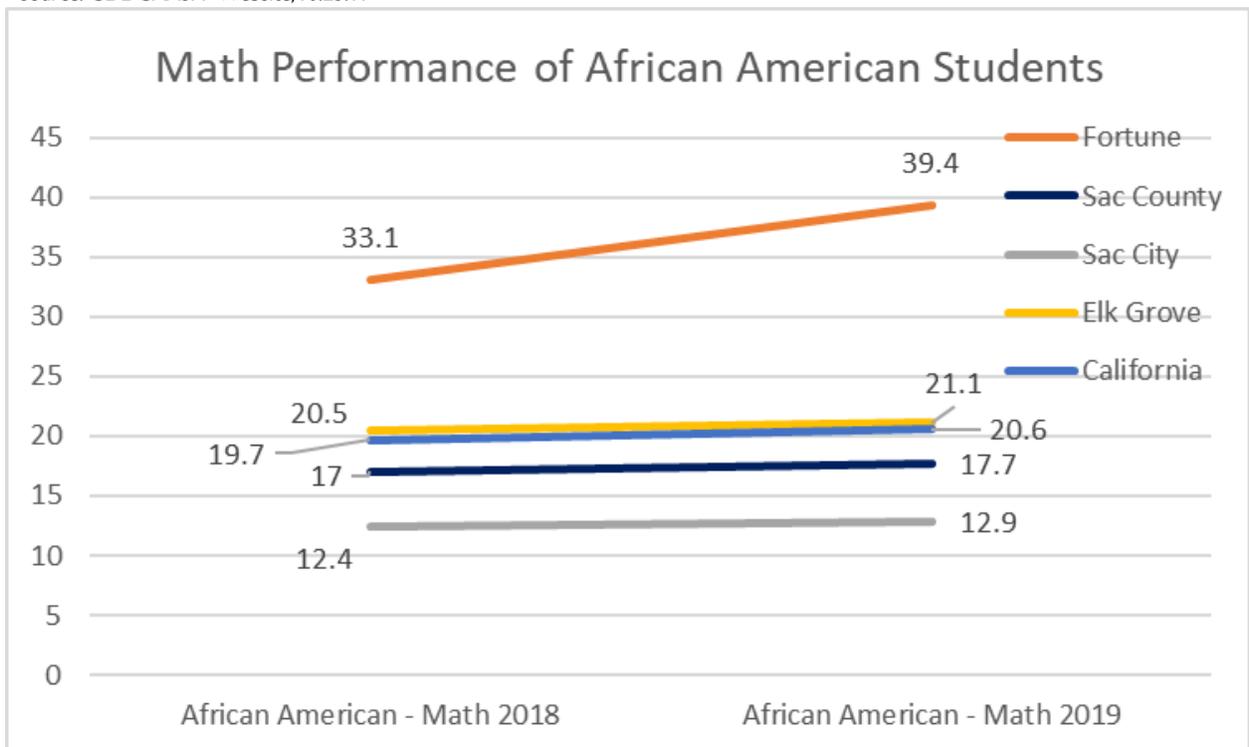
School	Growth
Fortune	6.4
Sac County	1.5
Natomas	3
Twin Rivers	2
Sac City	2.6
Elk Grove	0.6

Source: CDE CAASPP Website, 10.23.19

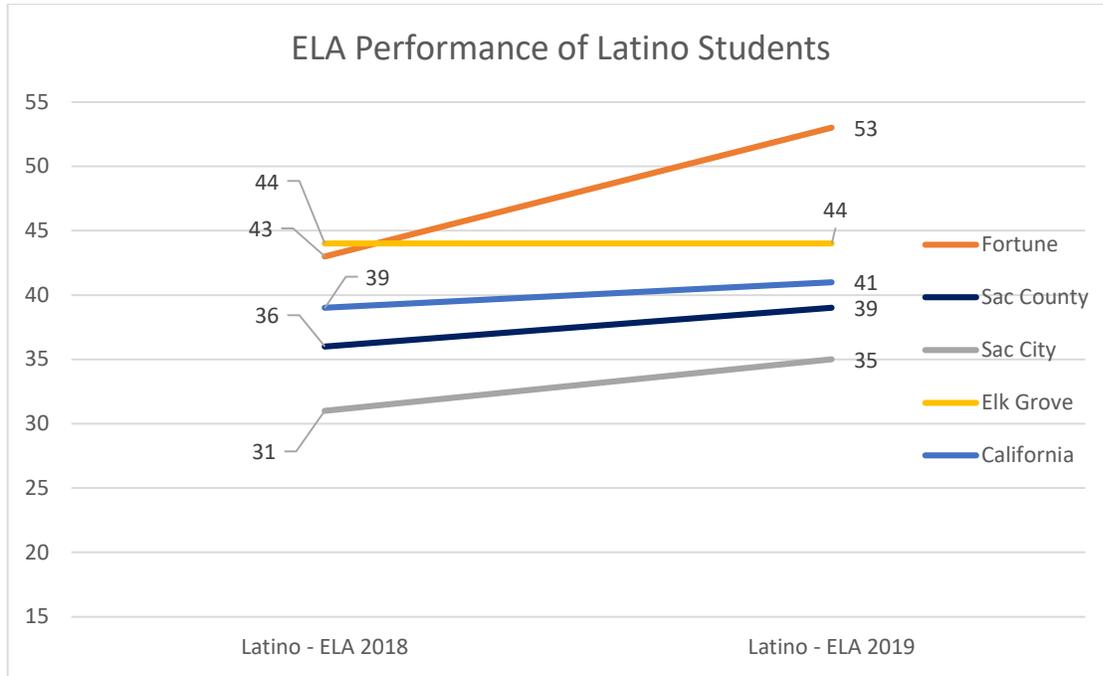
When looking at absolute performance of African American students, Fortune remains the top performer when compared to other districts, the county and the state in both ELA and Math. Fortune is also growing at the fastest rate, with 2.2 points of growth in ELA and 6.3 points of growth in Math. Fortune is growing at a rate 7 times greater than the state in Math and 3 times greater than the state in ELA. **This demonstrates achievement gap closing growth.**



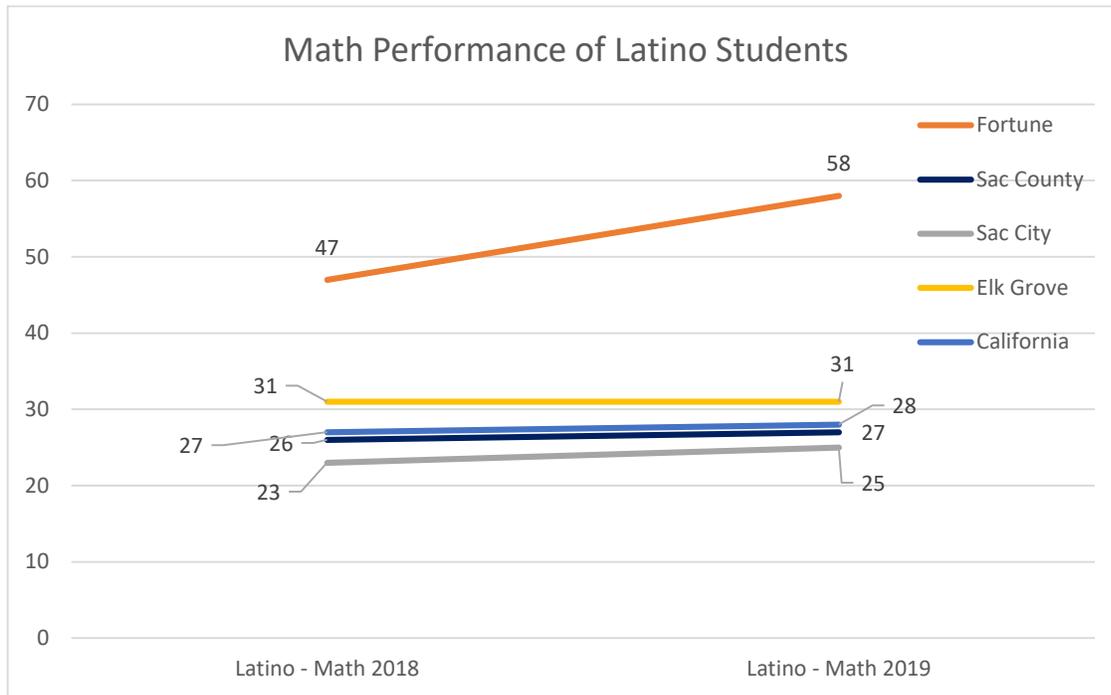
Source: CDE CAASPP Website, 10.23.19



In addition to the outstanding performance of Fortune’s African American scholars, Fortune’s Latino scholars, which make up about 25% of Fortune’s student population have also improved dramatically and are far exceeding the performance of Latino students in other local school districts and the state. The charts below compare the Math and ELA performance of Fortune’s Latino scholars to the Latino students in other districts.

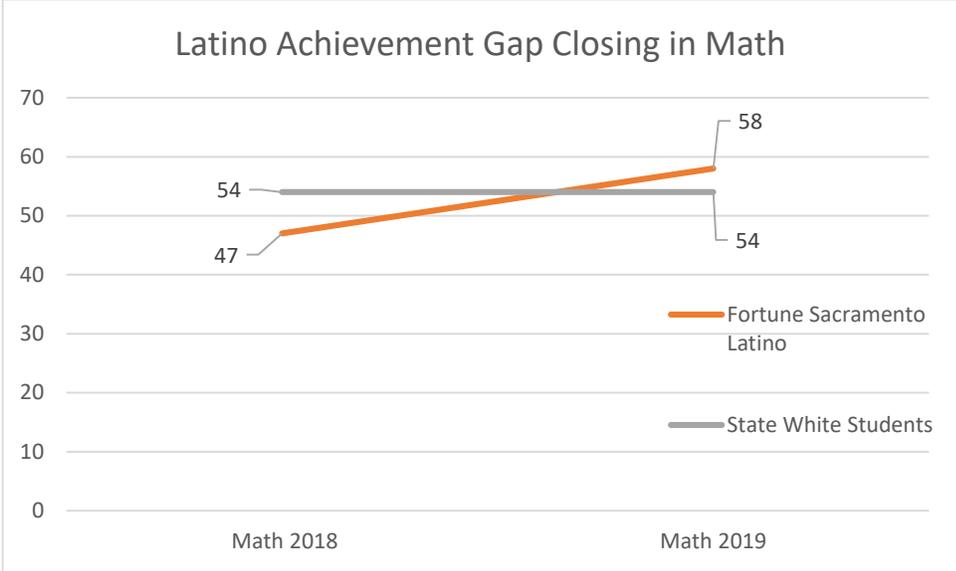


Source: CDE CAASPP Website, 10.23.19

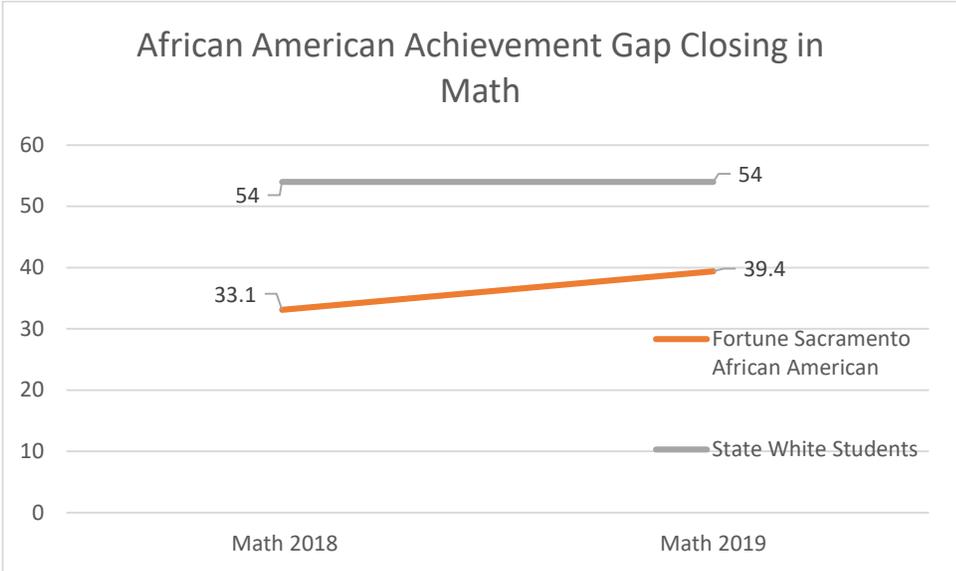


Source: CDE CAASPP Website, 10.23.19

As an organization focused on closing achievement gaps, in the 18-19 school year, Fortune Latino scholars surpassed the performance of White students statewide in Math, closing that achievement gap. Fortune has also significantly narrowed the achievement gap between African American and White students.



Source: CDE CAASPP Website, 10.23.19



Source: CDE CAASPP Website, 10.23.19

How Fortune Will Continuously Improve

Continuous improvement is central to our academic philosophy. As such, we are currently engaged in many strategies to improve our results. Each year Fortune develops organizational priorities through an extensive stakeholder engagement process with parents, teachers and school leaders. These are the priorities that Fortune wants to “win on” not just “work on.” Additionally, these organizational priorities drive our spending decisions reflected in our board-adopted budget and LCAP. The 2019-20 Organizational Priorities can be found in Appendix I.



1 TEACHER RETENTION

Fortune School will increase the teacher retention rate to 80% within 2 years.

2 CULTURE

Each campus will fully implement the Fortune School culture for adults and children to a level of excellence.

Each teacher will score 80% or higher on the Classroom Culture Observation Rubric each trimester.

Each campus will be inspected annually for fidelity to the Fortune School culture and be provided actionable feedback.

3 GROWTH

Fortune School will grow to 1,834 student enrollment by 2019-20 and launch new schools in the 2020-21 school year:

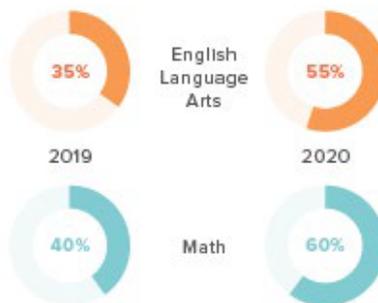
FORTUNE MIDDLE SCHOOL 150 students, Grades 6-8, Open Fall 2020

TECOY PORTER COLLEGE PREP 150 students, Grades TK-1, Open Fall 2020

FORTUNE PRESCHOOL Open 2020

4 K-1 STUDENT PERFORMANCE FOR READING AND MATHEMATICS

By 2020, Fortune School will increase the percentage of K-1 scholars that are above the 60th percentile on NWEA MAP to 55% in ELA and 60% in Mathematics.



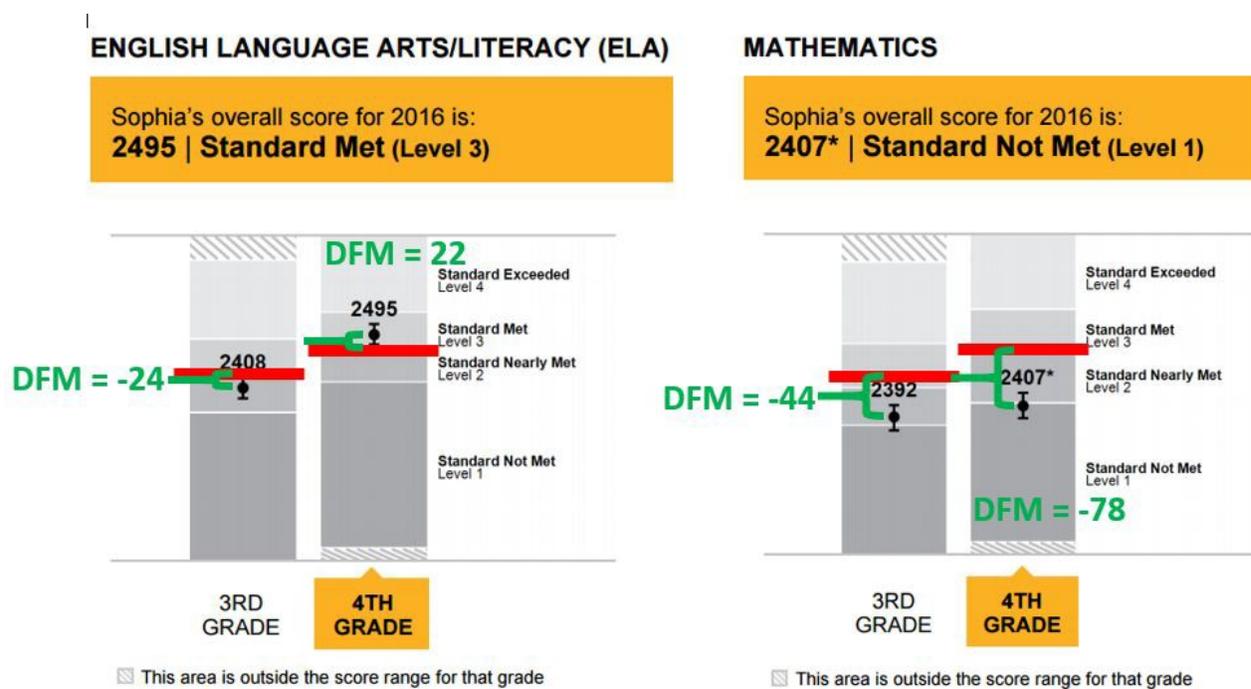
5 REGIONAL ACCREDITATION

Fortune School of Education will earn regional accreditation and establish Fortune University as a Historically Black College in Sacramento.

Technical Appendix

From Achievement Levels to Scale Scores

Each student who completes a Smarter Balanced assessment receives a scale score in both ELA and Math. The scale scores fall into one of four performance levels, with ranges depending on the particular grade and subject. A publicly available research file provides the average scale score for each grade at every school. To standardize performance across grades and subjects, we subtract the minimum scale score to score in the third performance level (i.e. Standard Met) from average scale score in each grade. We call this the DFM, or “Distance From Met.” A score of zero means that the average score for that grade was exactly the minimum score to be Met; a score of negative 30 means that the average score for that grade was 30 points below the minimum Met score. The graphics below show how to calculate DFM for an individual student with scores from grades 3 and 4.



For each subject, we calculate the weighted average of DFM scores across all grades in a school. We weight by the number of students with valid test scores. This produces the same average DFM for each subject that we would obtain with student-level data. We then take the average of the ELA and Math DFM scores to obtain one overall DFM score for each school.

The average ranked school in 2015-16 had a DFM of 23 points below Met. The standard deviation was 46 points, and DFM ranged from 215 points below Met to 151 points above Met.

State Ranks

To make State Ranks, we divide schools into deciles based on their DFM. The primary assumption this makes is that DFM is an equally difficult standard across grades. The table below shows the average DFM of students statewide by subject and overall. We see that while DFM for each subject varies significantly by grade, overall DFM is extremely uniform across grade levels. With the exception of third grade, average DFM scores only range from -22 to -28. This means that regardless of the grades schools serve, DFM measures them fairly.

2015-16 CAASPP Scores

Grade	ELA DFM	Math DFM	Overall DFM
3	-18	-11	-15
4	-19	-25	-22
5	-6	-43	-25
6	-12	-43	-28
7	-10	-42	-26
8	-8	-45	-26
11	17	-60	-22

Similar School Ranks

While we hold all students to the same standard, the unfortunate reality is that demographics explain a large portion of current variation in achievement. Starting in 2000, the California Department of Education ran regressions of demographics on performance in order to create a school comparison index. This index was then used to determine for each school a literal list of its 100 most similar demographically comparable schools. The California Charter Schools Association (CCSA) worked with researchers and practitioners to create a “Similar Students Measure” that borrowed heavily from the state’s school comparison index. Instead of creating lists of similar schools, however, CCSA compared each school’s actual performance to the performance predicted by regression models. This resulted in a measure – scaled from 1 to 20 – that reflected the degree to which each school performed higher or lower than we would expect given its students’ demographics. This methodology has evolved over time to keep pace with changes in state testing and reporting.

We, in turn, borrow heavily from CCSA in creating our Similar School Ranks. The infographic below explains our methodology at a high level:



We run regressions for each grade and subject for all schools. We only exclude data for grades that have fewer than 11 valid test-takers, because we worry that such small numbers of students would blur the true relationship between demographics and performance. A similar rationale applies to our decision to use the number of valid test takers as frequency weights: we want to determine the relationship between demographics and performance as accurately as possible. We get more information about this relationship when there are more students, and the weights capture that reality. The dependent variable is the average scale score in that grade and subject. The independent variables are:

- Binary indicators for schools that are (1) magnet or (2) DASS (Dashboard Alternative School Status)
- The percentage and squared percentage of test-takers in each of four ethnic/racial categories:
 - o African American, Asian, Latino, and Other (White is the reference category)
- The percentage and squared percentage of test-takers in each of four other categories: o Students with disabilities, socioeconomically disadvantaged students, English Learners, and Reclassified Fluent English Proficient (R-FEP) students
- Average parent education, ranged from 1 (no parents complete high school) to 5 (all parents completed graduate school); and this term squared

The squared variables capture the extent to which concentrations of particular student groups influence performance. Information on average parent education is based on school surveys with known response rates, and for some schools the response rate is zero. In order to include all schools in the analysis, we run pairs of regressions for each grade and subject: one regression includes average parent education, while the other does not. We then use the response rate to weight the results of both regressions. This approach is borrowed directly from the state's and CCSA's methodology.

For each grade and subject, we obtain one "gap" measure (i.e. actual minus predicted). We average ELA and Math and then take the weighted average across all grades to create one "gap" for each school. Lastly, we convert this "gap" into the Similar Schools Rank by dividing into deciles all schools that are not DASS or tiny (i.e. fewer than 30 students with scores).

Budget Narrative File(s)

* **Mandatory Budget Narrative Filename:**

[Add Mandatory Budget Narrative](#)

[Delete Mandatory Budget Narrative](#)

[View Mandatory Budget Narrative](#)

To add more Budget Narrative attachments, please use the attachment buttons below.

[Add Optional Budget Narrative](#)

[Delete Optional Budget Narrative](#)

[View Optional Budget Narrative](#)



Fortune School Replication Grant Budget Narrative

The following Budget Narrative outlines the CSP grant budget for the planning and implementation of the Fortune School Expansion. The budget captures the costs of opening two new elementary schools to the Fortune network of schools. The project will add 670 seats in the high-quality Fortune School network at two new elementary schools. This project will take place over a five year period from July 1, 2020 through June 30, 2025.

[Redacted Table Content]

The following tables describe the categorical breakdowns and the line item costs for each of the categories in the areas Fortune School proposes to fund during the term of the grant.

B. Budget by Federal Category

1. Personnel

<u>Summary Title</u>	Project Year					Total
	1	2	3	4	5	

In personnel, Fortune proposes to bring an experienced principal from one of our successful sites. This person will be the principal trainer for the first two years at each site. This will ensure that the new schools are implementing the Fortune academic program and culture with fidelity and ensuring strong academic outcomes for our students.

2. Fringe Benefits

<u>Summary Title</u>	Project Year					Total
	1	2	3	4	5	

These benefits will support the personnel costs explained in section 1 to ensure that employees are provided with benefits where required and Fortune School pays the appropriate taxes.

3. Travel

<u>Summary Title</u>	Project Year					Total
	1	2	3	4	5	
Project Directors Meeting and Prof Development Travel	\$6,000	\$11,000	\$12,000	\$7,000	\$7,000	\$43,000
3. Travel	\$6,000	\$11,000	\$12,000	\$7,000	\$7,000	\$43,000

Two types of travel are proposed during the project. First is the Annual Project Director Meeting – Fortune School proposes to spend these funds for travel to Washington D.C. or wherever the project convening is held for grant recipients. These costs will cover travel, hotel and meals for the Project Director. Fortune also will spend funds on travel for the principal, principal trainee and master teachers to attend professional development at Fortune Schools – CSP Replication and Expansion Grant_ Budget Narrative | January 2020 **2** | Page

RELAY graduate school of education.

4. Equipment

Summary Title	Project Year					Total
	1	2	3	4	5	
Acquiring Necessary Furniture and Equipment (TPCP)	\$289,315	\$57,532	\$59,532	\$74,132	\$57,532	\$538,043
Acquiring Necessary Furniture and Equipment (New K-5)	\$0	\$0	\$261,779	\$84,798	\$175,596	\$522,173
4. Equipment	\$289,315	\$57,532	\$321,311	\$158,930	\$233,128	\$1,060,216

Fortune School has described the quantity and types of equipment on which we propose to spend grant funds. As referenced in the table above, the primary categories of equipment that will be acquired are computers and furniture. Included in the amounts in the above chart, are for chromebooks at 1:1 ratio and Chromebook carts. Each of the line items above represent expenditures at different school sites. Our academic model relies heavily on technology for assessments and supplemental materials. Teacher equipment are the furniture and materials necessary for a classroom to function.

An itemized list of expenditures that make up the equipment proposal for Tecoy Porter College Prep is found here:

Tecoy Porter College Prep
Furniture, Fixtures and Equipment

	# units	\$ per unit	FY 20-21	# units	FY 21-22	# units	FY 22-23	# units	FY 23-24	# units	FY 24-25
Short Throw Projectors (classrooms inc music/art/SPED, MP room and conf)	11	\$1,700	\$18,700	2	\$3,400	2	\$3,400	2	\$3,400	2	\$3,400
Markerboards (in every room with projector)	18	\$450	\$8,100	2	\$900	2	\$900	2	\$900	2	\$900
Bulletin Boards (2 per classroom + front office)	33	\$320	\$10,560	2	\$640	2	\$640	2	\$640	2	\$640
Paper Trimmer	1	\$175	\$175	0	\$0	0	\$0	0	\$0	0	\$0
Butcher Paper Floor Rack	1	\$750	\$750	0	\$0	0	\$0	0	\$0	0	\$0
Laminator	1	\$1,800	\$1,800	0	\$0	0	\$0	0	\$0	0	\$0
Teachers Workroom (2 tables/6 chairs/2 metal cabinets)	1	\$3,000	\$3,000	0	\$0	0	\$0	0	\$0	0	\$0
Kinder Tables	24	\$115	\$2,760	0	\$0	0	\$0	0	\$0	0	\$0
Student Chairs	210	\$105	\$22,050	128	\$13,440	128	\$13,440	128	\$13,440	128	\$13,440
Student Desks	90	\$185	\$16,650	60	\$11,100	60	\$11,100	60	\$11,100	60	\$11,100
Half Moon Tables	6	\$315	\$1,890	2	\$630	2	\$630	2	\$630	2	\$630
Computer Tables	6	\$370	\$2,220	2	\$740	2	\$740	2	\$740	2	\$740
Teacher Easels	9	\$150	\$1,350	2	\$300	2	\$300	2	\$300	2	\$300
Early Learning Markerboard Stations and rugs	4	\$700	\$2,800	0	\$0	0	\$0	0	\$0	0	\$0
Intervention Room Furniture	1	\$1,500	\$1,500	0	\$0	0	\$0	0	\$0	0	\$0
Task Chairs - teachers (6 classroom/1 SPED/1 Music/I PE/1 Art)	10	\$210	\$2,100	2	\$420	2	\$420	2	\$420	2	\$420
Teacher Desk	10	\$400	\$4,000	2	\$800	2	\$800	2	\$800	2	\$800
Teacher Metal Storage Cabinet	10	\$373	\$3,730	2	\$746	2	\$746	2	\$746	2	\$746
Teacher Lateral File	10	\$430	\$4,300	2	\$860	2	\$860	2	\$860	2	\$860
Teacher Bookshelves	10	\$378	\$3,780	2	\$756	2	\$756	2	\$756	2	\$756
Teachers Lunch Room (2 tables/6 chairs/microwave w/cart & fridge)	1	\$3,000	\$3,000	0	\$0	0	\$0	0	\$0	0	\$0
Admin Offices (Counselor/Prin/Asst Prin/Office Mgr/Other)	5	\$2,000	\$10,000	0	\$0	0	\$0	0	\$0	0	\$0
Open Admin - School Secretary/Parent Liaison	1	\$2,000	\$2,000	0	\$0	0	\$0	0	\$0	0	\$0
Conference Room Table and 8 Chairs	1	\$2,000	\$2,000	0	\$0	0	\$0	0	\$0	0	\$0
Fire File	1	\$4,000	\$4,000	0	\$0	0	\$0	1	\$4,000	0	\$0
Lobby Furniture	1	\$2,500	\$2,500	0	\$0	0	\$0	0	\$0	0	\$0
Music Room (Shelving/Metal Cabinets/Music Stands/Chairs)	1	\$5,000	\$5,000	0	\$0	0	\$0	0	\$0	0	\$0
Art Room (Shelving/Metal Cabinets/Easels/Chairs)	1	\$5,000	\$5,000	0	\$0	0	\$0	0	\$0	0	\$0
Multi-Purpose Room Furniture (Lunch Tables with benches)	15	\$2,000	\$30,000	0	\$0	0	\$0	0	\$0	0	\$0
Janitorial and Storage Room Wire Shelving	4	\$300	\$1,200	0	\$0	0	\$0	0	\$0	0	\$0
Student Chromebooks	150	\$300	\$45,000	60	\$18,000	60	\$18,000	60	\$18,000	60	\$18,000
Chromebook Carts	6	\$1,000	\$6,000	2	\$2,000	2	\$2,000	2	\$2,000	2	\$2,000
Admin Computers and Printers	1	\$10,000	\$10,000	0	\$0	1	\$2,000	1	\$2,000	0	\$0
Teacher Computers and Printers	10	\$1,400	\$14,000	2	\$2,800	2	\$2,800	2	\$2,800	2	\$2,800
Total Non-Capitalized FF&E			\$251,915		\$57,532		\$59,532		\$63,532		\$57,532
Network Infrastructure			\$20,000		\$0		\$0		\$0		\$0
Food Service FF & E			\$17,400		\$0		\$0		\$10,600		\$0
Total Capitalized FF&E			\$37,400		\$0		\$0		\$10,600		\$0
Total FF&E			\$289,315		\$57,532		\$59,532		\$74,132		\$57,532

An itemized list of the items that make up the equipment expenses for the new K-5 can be found here:

New K-5 College Prep
Furniture, Fixtures and Equipment

	# units	\$ per unit	FY 20-21	# units	FY 21-22	# units	FY 22-23	# units	FY 23-24	# units	FY 24-25
Short Throw Projectors (classrooms inc music/art/SPED, MP room and conf)	0	\$1,700	\$0	0	\$0	10	\$17,000	3	\$5,100	6	\$10,200
Markerboards (in every room with projector)	0	\$450	\$0	0	\$0	17	\$7,650	3	\$1,350	6	\$2,700
Bulletin Boards (2 per classroom + front office)	0	\$320	\$0	0	\$0	31	\$9,920	3	\$960	6	\$1,920
Paper Trimmer	0	\$175	\$0	0	\$0	1	\$175	0	\$0	0	\$0
Butcher Paper Floor Rack	0	\$750	\$0	0	\$0	1	\$750	0	\$0	0	\$0
Laminator	0	\$1,800	\$0	0	\$0	1	\$1,800	0	\$0	0	\$0
Teachers Workroom (2 tables/6 chairs/2 metal cabinets)	0	\$3,000	\$0	0	\$0	1	\$3,000	0	\$0	0	\$0
Kinder Tables	0	\$115	\$0	0	\$0	24	\$2,760	0	\$0	0	\$0
Student Chairs	0	\$105	\$0	0	\$0	146	\$15,330	192	\$20,160	384	\$40,320
Student Desks	0	\$185	\$0	0	\$0	60	\$11,100	90	\$16,650	180	\$33,300
Half Moon Tables	0	\$315	\$0	0	\$0	5	\$1,575	3	\$945	6	\$1,890
Computer Tables	0	\$370	\$0	0	\$0	5	\$1,850	3	\$1,110	6	\$2,220
Teacher Easels	0	\$150	\$0	0	\$0	9	\$1,350	3	\$450	6	\$900
Early Learning Markerboard Stations and rugs	0	\$700	\$0	0	\$0	3	\$2,100	0	\$0	0	\$0
Intervention Room Furniture	0	\$1,500	\$0	0	\$0	1	\$1,500	0	\$0	0	\$0
Task Chairs - teachers (5 classroom/1 SPED/1 Music/I PE/1 Art)	0	\$210	\$0	0	\$0	9	\$1,890	3	\$630	6	\$1,260
Teacher Desk	0	\$400	\$0	0	\$0	9	\$3,600	3	\$1,200	6	\$2,400
Teacher Metal Storage Cabinet	0	\$373	\$0	0	\$0	9	\$3,357	3	\$1,119	6	\$2,238
Teacher Lateral File	0	\$430	\$0	0	\$0	9	\$3,870	3	\$1,290	6	\$2,580
Teacher Bookshelves	0	\$378	\$0	0	\$0	9	\$3,402	3	\$1,134	6	\$2,268
Teachers Lunch Room (2 tables/6 chairs/microwave w/cart & fridge)	0	\$3,000	\$0	0	\$0	1	\$3,000	0	\$0	0	\$0
Admin Offices (Counselor/Prin/Asst Prin/Office Mgr/Other)	0	\$2,000	\$0	0	\$0	5	\$10,000	0	\$0	0	\$0
Open Admin - School Secretary/Parent Liaison	0	\$2,000	\$0	0	\$0	1	\$2,000	0	\$0	0	\$0
Conference Room Table and 8 Chairs	0	\$2,000	\$0	0	\$0	1	\$2,000	0	\$0	0	\$0
Fire File	0	\$4,000	\$0	0	\$0	1	\$4,000	0	\$0	0	\$0
Lobby Furniture	0	\$2,500	\$0	0	\$0	1	\$2,500	0	\$0	0	\$0
Music Room (Shelving/Metal Cabinets/Music Stands/Chairs)	0	\$5,000	\$0	0	\$0	1	\$5,000	0	\$0	0	\$0
Art Room (Shelving/Metal Cabinets/Easels/Chairs)	0	\$5,000	\$0	0	\$0	1	\$5,000	0	\$0	0	\$0
Multi-Purpose Room Furniture (Lunch Tables with benches)	0	\$2,000	\$0	0	\$0	15	\$30,000	0	\$0	0	\$0
Janitorial and Storage Room Wire Shelving	0	\$300	\$0	0	\$0	4	\$1,200	0	\$0	0	\$0
Student Chromebooks	0	\$300	\$0	0	\$0	125	\$37,500	85	\$25,500	190	\$57,000
Chromebook Carts	0	\$1,000	\$0	0	\$0	5	\$5,000	3	\$3,000	6	\$6,000
Admin Computers and Printers	0	\$10,000	\$0	0	\$0	1	\$10,000	0	\$0	0	\$0
Teacher Computers and Printers	0	\$1,400	\$0	0	\$0	9	\$12,600	3	\$4,200	6	\$8,400
Total Non-Capitalized FF&E			\$0		\$0		\$223,779		\$84,798		\$175,596
Network Infrastructure			\$0		\$0		\$20,000		\$0		\$0
Food Service FF & E			\$0		\$0		\$18,000		\$0		\$0
Total Capitalized FF&E			\$0		\$0		\$38,000		\$0		\$0
Total FF&E			\$0		\$0		\$261,779		\$84,798		\$175,596

5. Supplies

Summary Title	Project Year					Total
	1	2	3	4	5	
Acquiring Necessary Educational Materials and Supplies (TPCP)	\$30,000	\$10,000	\$10,000	\$10,000	\$8,776	\$68,776
Acquiring or Developing Curriculum Materials (new K-5)	\$60,000	\$30,000	\$30,000	\$30,000	\$30,000	\$180,000
Acquiring Necessary Educational Materials and Supplies (TPCP)	\$0	\$0	\$30,000	\$18,000	\$9,719	\$57,719
Acquiring or Developing Curriculum Materials (new K-5)	\$0	\$0	\$60,000	\$45,000	\$30,000	\$135,000
5. Supplies	\$90,000	\$40,000	\$130,000	\$103,000	\$78,495	\$441,495

As shown in the table above, supplies are where Fortune proposes costs for all of its curriculum. These costs include the costs to purchase the Fortune curriculum in math, English language arts, science and social studies. FSE also has vibrant musical programs and these funds will also provide resources to continue those programs in our new schools is an important part of the program. Lastly, Fortune Schools have also proposed costs associated with PE and athletics programs which are an important part of the school model and the culture.

6. Contractual

Summary Title	Project Year					Total
	1	2	3	4	5	
Preparation of Emergency Preparedness Plan (TPCP)	\$2,500	\$500	\$500	\$500	\$500	\$4,500
License fees for Aries Attendance System (TPCP)	\$1,500	\$2,100	\$2,600	\$3,140	\$4,000	\$13,340
Printing and Reproduction (postcards, flyers, banners) (TPCP)	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000
Website Development (TPCP)	\$1,500	\$0	\$0	\$0	\$0	\$1,500
Advertising (radio ads, electronic billboards) (TPCP)	\$50,000	\$10,000	\$10,000	\$10,000	\$10,000	\$90,000
Data accountability and analysis - Illuminate Assessment SIS (TPCP)	\$600	\$840	\$1,040	\$1,256	\$1,600	\$5,336
Professional development Relay and AF Training (TPCP)	\$26,500	\$35,000	\$0	\$0	\$0	\$61,500
Preparation of Emergency Preparedness Plan (New K-5)	\$0	\$0	\$2,500	\$500	\$500	\$3,500
License fees for Aries Attendance System (New K-5)	\$0	\$0	\$1,250	\$2,100	\$2,700	\$6,050
Printing and Reproduction (postcards, flyers, banners) (New K-5)	\$0	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Website Development (New K-5)	\$0	\$1,500	\$0	\$0	\$0	\$1,500
Advertising (radio ads, electronic billboards) (New K-5)	\$0	\$50,000	\$10,000	\$10,000	\$10,000	\$80,000
Data accountability and analysis - Illuminate Assessment SIS (New K-5)	\$0	\$0	\$500	\$840	\$1,080	\$2,420
Professional development Relay and AF Training (New K-5)	\$0	\$0	\$34,000	\$7,500	\$7,500	\$49,000
6. Contractual	\$92,600	\$119,940	\$82,390	\$55,836	\$57,880	\$408,646

Fortune School understands the importance of school safety and has proposed funding to consultants to assist with an emergency preparedness plan at each of the new schools. These plans are operable at our current schools and are very important. Fortune also proposes funding for recruitment to reach our target audience of educationally

disadvantaged students. We will be conducting print and radio advertising as well as flyers to travel to the neighborhoods where the educationally disadvantaged students live to share with these students the new schools in their neighborhoods. Through this active recruiting we are reaching out to those students who need our schools the most, not passively waiting for interested and engaged parents to find our schools. Fortune also proposes including funds for inclusion of data systems where student test data is collected weekly and analyzed by the data and analytics staff. This relentless focus on data is a hallmark of the Fortune model and will be a major part of this expansion. Another key lever for school success is training our principals at RELAY graduate school of education. We have found it highly beneficial to train our principals and the principal supervisors using the methods taught by RELAY and we propose to send the new school leaders to this training.

- 7. No Construction Costs
- 8. No Other Costs
- 9. Total Direct Costs are located in the table under factor 12
- 10. Indirect Costs

Summary Title	Project Year					Total
	1	2	3	4	5	
10. Indirect Costs (indirect cost rate of 5.12%)						

Fortune proposes to fund an indirect cost rate of 5.12 percent which is the current rate each school contributes to indirect costs for the charter management organization.

- 11. No Training Stipend Costs

12. Total Costs

The Total Budget for the project for each school is as follows:

Tecoy Porter College Prep	Category	Project Year					Total
		1	2	3	4	5	
Initial Implementation and Expansion of the Charter School							
Acquiring Necessary Furniture and Equipment	Equipment	\$289,315	\$57,532	\$59,532	\$74,132	\$57,532	\$538,043
Acquiring Necessary Educational Materials and Supplies	Supplies	\$30,000	\$10,000	\$10,000	\$10,000	\$8,776	\$68,776
Acquiring or Developing Curriculum Materials	Supplies	\$60,000	\$30,000	\$30,000	\$30,000	\$30,000	\$180,000
Initial Operating Costs - Personnel Expenses							
- Principal Trainer and Principal Trainee Salary	Personnel	\$155,000	\$159,650	\$0	\$0	\$0	\$314,650
- Employer taxes, health and worker's compensation expense	Fringe Benefits	\$39,062	\$40,234	\$0	\$0	\$0	\$79,296
Initial Operating Costs - Contractual Services							
- Preparation of Emergency Preparedness Plan	Contractual	\$2,500	\$500	\$500	\$500	\$500	\$4,500
- License fees for Aeries (Attendance and Gradebook)	Contractual	\$1,500	\$2,100	\$2,600	\$3,140	\$4,000	\$13,340
Informing the Community About the School							
- Printing and Reproduction (postcards, flyers, banners)	Contractual	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000
- Website Development	Contractual	\$1,500	\$0	\$0	\$0	\$0	\$1,500
- Advertising (radio ads, electronic billboards)	Contractual	\$50,000	\$10,000	\$10,000	\$10,000	\$10,000	\$90,000
Planning and design of the educational program							
Refinement of the desired educational results and of the methods for measuring progress toward achieving those results							
- Data accountability and analysis (Illuminate Assessment SIS)	Contractual	\$600	\$840	\$1,040	\$1,256	\$1,600	\$5,336
Professional development of teachers and other staff who will work in the charter school							
- Professional development Relay Graduate School	Contractual	\$18,000	\$26,500	\$0	\$0	\$0	\$44,500
- Professional development Achievement First Math and ELA	Contractual	\$8,500	\$8,500	\$0	\$0	\$0	\$17,000
- Travel to attend Professional Development	Travel	\$5,000	\$10,000	\$0	\$0	\$0	\$15,000
Project directors meeting	Travel	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
		\$671,977	\$366,856	\$124,672	\$140,028	\$123,408	\$1,426,941
Indirect Cost (Rate 5.12%)							

New K-5 School

New K-5 College Prep	Category	Project Year					Total
		1	2	3	4	5	
Initial Implementation and Expansion of the Charter School							
Acquiring Necessary Furniture and Equipment	Equipment	\$0	\$0	\$261,779	\$84,798	\$175,596	\$522,173
Acquiring Necessary Educational Materials and Supplies	Supplies	\$0	\$0	\$30,000	\$18,000	\$9,719	\$57,719
Acquiring or Developing Curriculum Materials	Supplies	\$0	\$0	\$60,000	\$45,000	\$30,000	\$135,000
Initial Operating Costs - Personnel Expenses							
- Principal Trainer and Principal Trainee Salary	Personnel	\$0	\$0	\$160,484	\$165,298	\$75,000	\$400,782
- Employer taxes, health and worker's compensation expense	Fringe Benefits	\$0	\$0	\$42,152	\$43,416	\$20,229	\$105,797
Initial Operating Costs - Contractual Services							
- Preparation of Emergency Preparedness Plan	Contractual	\$0	\$0	\$2,500	\$500	\$500	\$3,500
- License fees for Aeries (Attendance and Gradebook)	Contractual	\$0	\$0	\$1,250	\$2,100	\$2,700	\$6,050
Informing the Community About the School							
- Printing and Reproduction (postcards, flyers, banners)	Contractual	\$0	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
- Website Development	Contractual	\$0	\$1,500	\$0	\$0	\$0	\$1,500
- Advertising (radio ads, electronic billboards)	Contractual	\$0	\$50,000	\$10,000	\$10,000	\$10,000	\$80,000
Planning and design of the educational program							
Refinement of the desired educational results and of the methods for measuring progress toward achieving those results							
- Data accountability and analysis (Illuminate Assessment SIS)	Contractual	\$0	\$0	\$500	\$840	\$1,080	\$2,420
Professional development of teachers and other staff who will work in the charter school							
- Professional development Relay Graduate School	Contractual	\$0	\$0	\$26,500	\$0	\$0	\$26,500
- Professional development Achievement First Math and ELA	Contractual	\$0	\$0	\$7,500	\$7,500	\$7,500	\$22,500
- Travel to attend Professional Development	Travel	\$0	\$0	\$10,000	\$5,000	\$5,000	\$20,000
Project directors meeting							
	Travel	\$0	\$0	\$1,000	\$1,000	\$1,000	\$3,000
		\$0	\$61,500	\$623,664	\$393,453	\$348,324	\$1,426,941