

# **FORTUNE SCHOOL OF EDUCATION COUNTYWIDE CHARTER ANNUAL OVERSIGHT REPORT**

This report summarizes the Fortune School of Education (Fortune) 2020-2021 school year activities and includes an update on the start of the 2021-2022 school year. There are adjustments to this report given the impact of the COVID pandemic and the limited California Department of Education assessment and dashboard data.

The Memorandum of Understanding (MOU) with Fortune (2021-2026) outlines the following reporting requirements divided into the following five categories for the Annual Report:

## **I. Progress Toward Meeting Charter Goals/Local Control and Accountability Plan (LCAP) Goals**

- Past state assessment data (aggregate/disaggregate/significant groups)
- Report on expulsions and suspensions (LCAP goal)
- Summary data from annual student/parent satisfaction survey (LCAP goal) – impacted by COVID pandemic
- Other key statistics identified in 2021-2024 LCAP goals

## **II. Evidence Fortune is Financially Sound**

## **III. Key Demographic Data**

- Required elements per the MOU:
  - Overview of the admissions practices and the public random lottery, including the number of students participating in the lottery by school and number of students on waiting lists
  - Number of students enrolled and demographics
  - Summary of annual enrollment gains/losses

## **IV. General Information**

- Professional development activities
- Information on Fortune dissemination of best practices
- Summary of major board decisions and policies
- Data on parental involvement in governance and operation of the schools
- Executive Summary of the 2021-2024 LCAP

## **V. Fortune Team to Provide Information to the Board on Additional Items**

- Providing high quality distance learning
- Reopening campuses safely, in accordance with County Health Department guidelines
- Addressing COVID Learning Loss
- Fortune's Equity work
- How the Sacramento County Board of Education can support the success of the charter

## OVERVIEW

Fortune operates eight schools serving the following grade levels in 2021-2022:

School Site	Date Opened*	2021-2022 Grade Levels
Fortune School (FS)	2011-2012	TK-5
William Lee College Prep (WLCP)	2012-2013	TK-5
Alan Rowe College Prep (ARCP)	2013-2014	TK-8
Ephraim Williams College Prep (EWCP)	2014-2015	6-8
Hazel Mahone College Prep (HMCP)	2015-2016	TK-6
Rex & Margaret Fortune Early College HS (FECHS)	2017-2018	9-12
Tecoy Porter College Prep (TPCP)	2020-2021	TK-2
Fortune Middle School (FMS)	2020-2021	6-8

\*SOURCE: FORTUNE SCHOOLS

## FORTUNE CHARTER SCHOOL ENROLLMENT GROWTH OVER TIME

School Year	Enrollment Growth
2011-2012	171
2012-2013	439
2013-2014	707
2014-2015	898
2015-2016	1,195
2016-2017	1,371
2017-2018	1,356
2018-2019	1,235
2019-2020	1,463

School Year	Enrollment Growth
2020-2021	1,890
2021-2022	1,825

SOURCE: FORTUNE SCHOOLS

Fortune schools decreased enrollment in 2021-2022 by 65 students from 2020-2021.

## CONTEXT – LEARNING CONTINUITY AND ATTENDANCE PLAN FOR 2020-2021

Fortune implemented and offered distance learning for the entire 2020-2021 school year. After April 5, 2021, 50 percent of scholars opted to continue distance learning rather than return to in-person instruction although those numbers changed as hybrid learning options became available by the end of the school year.

**Continuity of Instruction:** Schools continued to offer curricula for all subjects: ELA, Math, Science, Humanities, Music, PE, and electives. The main challenge was the need to fit the content from those curricula into the instructional minutes available during the 2020-2021 school year. Music, PE, and electives were offered during asynchronous time, maximizing the synchronous instructional time scholars had with teachers to learn their core academics. Teachers adjusted the pacing guides in order to cover the essential standards within the time available.

**Access to Devices and Connectivity:** The main challenge was that many scholars lacked a device they could use for distance learning, and some scholars even lacked reliable internet. Therefore, schools provided working devices, Wi-Fi hotspots, and monthly internet service throughout the school year. This significant investment of time and money enabled 100% of scholars to successfully participate in distance learning.

**Pupil Participation and Progress:** The main challenge was getting scholars accustomed to participating in distance learning each day and absenteeism was high during the first trimester. To improve attendance, Fortune implemented a system of daily personalized attendance calls. School staff tracked all calls to families, creating a record that enabled teachers and staff to have conversations with families whose scholars were chronically absent. Chronic absence rate declined below 10%. Fortune hired a third-party vendor, Attention to Attendance, as an early warning and attendance intervention system designed to increase learning time for all students and improve attendance.

**Support for Pupils with Unique Needs:** Fortune's Educational Specialists could not provide in-person support as a result of COVID-related public health restrictions. The Special Education Team found that a number of scholars with disabilities have had an improved experience during distance learning. For example, some scholars were less distracted, while others benefitted from being able to take breaks and make more noise during the school day. Staff's adaptability and capacity to creatively problem solve to better meet student needs continued throughout the year.

**Learning Loss:** The first wave of learning loss occurred during the emergency distance learning that occurred from March 2020 to the end of the 2019-2020 school year. Scholars accessed Google Classroom invitations, and most scholars submitted at least one

assignment each week, although very few scholars submitted more than one or two assignments each week.

The second wave of learning loss occurred during the 2020-2021 school year. Fortune was 100% distance learning through March 2021 and there was a 97% attendance rate, but many scholars either were not turning in many assignments or were turning in work of very low quality. In late February and early March 2021, the NWEA Map assessments were administered remotely, and scholars demonstrated a substantial academic decline that is likely to take multiple years to overcome. Addressing these learning loss gaps continues to be a high priority.

Hybrid learning was offered from April 5, 2021 to the end of the school year. Sixty-three (63) percent of scholars opted for hybrid learning, which consisted of in-person instruction from approximately 8:00 a.m. to 1:00 p.m. followed by asynchronous learning in the afternoon. Results from the summative state tests, as well as NWEA results for state non-testing grades, were used to evaluate the impact of in-person instruction.

**Social-Emotional Well Being:** Limited face-to-face interaction has been the biggest challenge in monitoring and supporting mental health. Teachers and staff used virtual and phone conversations to assess needs and support scholars who remained in distance learning. The biggest success has been the implementation of the Second Step mental health curriculum emphasizing skills for learning, empathy, emotion management, and problem solving. All scholars in grades TK-5 participate in the Second Step curriculum focused on building a supportive community through social-emotional learning.

## **PART 1 – PROGRESS TOWARD MEETING CHARTER GOALS/LCAP GOALS – SUMMARY CHART ON PAGE 22**

**Lessons Learned:** One important lesson from 2020-2021 was the need to focus on the goal of learning loss mitigation. Even scholars who engaged with the distance learning program did not learn as much as in a normal school year. Internal interim assessments given in March indicated the majority of scholars experienced a substantial academic decline. The goal now is to overcome this decline over the next two years so students surpass previous achievement levels by the third and final year of the 2021-2024 LCAP. Another lesson was the importance and value of in-person, small group instruction, a key action of the 2021-2024 LCAP.

A final lesson from 2020-2021 was the power of real-time dashboards. Fortune learned how to use codes in Google Sheets to combine information from the student information system (Aeries), family communication software (ParentSquare), and Google Forms. The system included tabs for each school site as well as a summary tab that showed data for each site and grade system wide. This combination created dashboards that could be updated daily and easily accessed to provide real-time accountability.

## **LCAP GOALS**

### **Instruction**

Improve and support student learning to close the achievement gap by providing high-quality classroom instruction that raises rigor to a college-ready bar. Eleven (11) measurable outcomes are in place to measure progress toward this goal.

## **Culture**

Cultivate a culture of high expectations for academic achievement and conduct that are clearly designed, measurable, and make no excuses based on the background of students. Students, parents, teachers, and staff create and reinforce a culture of achievement and support. Eight (8) measurable outcomes are in place to measure progress toward this goal.

## **Operations**

Create safe, clean, and welcoming learning environments. Four (4) measurable outcomes are in place to measure progress toward this goal.

A summary table of the status of LCAP goals and measurable outcomes is on page 22 of the report.

## **LCAP Goal: Instruction**

Pursuant to the MOU, the annual oversight report will include a report of state assessment data. California Assessment of Student Performance and Progress (CAASPP) results for English Language Arts (ELA) and Math are shown in the report.

**LCAP Expected Annual Measurable Outcome:** In the 2014-2015 school year, Fortune established a baseline of 31% meeting or exceeding standards for ELA and 22% meeting or exceeding standards for Math on the Smarter Balanced Assessments. The goal is to grow annually by five (5) percentage points. The upward trajectory of students' scores was headed in the right direction before the suspension of CAASPP.

## **Actual Annual Measurable Outcome:**

### **FORTUNE ENGLISH LANGUAGE ARTS (ELA) AND MATH TEST RESULTS FROM 2014-2015 (BASELINE) TO 2020-2021**

#### **1.1 FORTUNE HISTORICAL CAASPP ELA RESULTS**

<b>School Year</b>	<b>Meeting or Exceeding Standards</b>	<b>Percentage Point Growth</b>
2014-2015	31%	0.00%
2015-2016	31%	0.00%
2016-2017	35.45%	4.45%
2017-2018	38.78%	3.33%
2018-2019	45.18%	6.40%
2019-2020	No state testing	N/A
2020-2021	30.38%	-14.80%

SOURCE: FORTUNE SCHOOLS/SCOE

There was no state testing in 2019-2020 due to COVID-19 related school closures. Fortune declined 14.8% from 2018-2019 to 2020-2021 in ELA. This decline is significantly less than the 26% statewide decline during the same period (based on schools that had at least 90% of students test in spring 2021).

## 1.2 FORTUNE HISTORICAL CAASPP MATH RESULTS

School Year	Meeting or Exceeding Standards	Percentage Point Growth
2014-2015	22%	0.00%
2015-2016	25%	3.00%
2016-2017	27.32%	2.32%
2017-2018	37.26%	9.94%
2018-2019	45.90%	8.64%
2019-2020	No state testing	N/A
2020-2021	21.37%	-24.53%

SOURCE: FORTUNE/SCOE

Fortune declined 24.53% from 2018-2019 to 2020-2021 in mathematics. This decline is nearly identical to the 24% statewide decline during the same period (based on schools that had at least 90% of students test in spring 2021).

## 1.3 FORTUNE STUDENTS TESTED BY GRADE FOR CAASPP ELA

School Year	3 <sup>rd</sup> Grade	4 <sup>th</sup> Grade	5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade	Total
2016-2017	175	136	110	80	48	35	584
2017-2018	149	135	103	104	47	37	575
2018-2019	125	106	113	79	70	36	529
2019-2020 (No state testing)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2020-2021	159	138	131	139	120	88	775

SOURCE: FORTUNE SCHOOLS

#### 1.4 FORTUNE CAASPP ELA RESULTS (STANDARD MET)

School Year	3 <sup>rd</sup> Grade	4 <sup>th</sup> Grade	5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade	Total
2016-2017	36.00%	41.18%	31.18%	31.25%	25.00%	25.71%	35.45%
2017-2018	34.57%	46.67%	39.81%	34.62%	46.81%	21.62%	38.78%
2018-2019	48.80%	44.34%	51.32%	21.52%	51.43%	55.56%	45.18%
2019-2020 (No state testing)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2020-2021	23.90%	25.36%	44.27%	23.87%	37.50%	23.86%	30.38%
Change from Prior Year	-24.90%	-18.98%	-7.05%	2.35%	-13.93%	-31.70%	-14.80%

SOURCE: FORTUNE SCHOOLS/SCOE

#### 1.5 MATH CAASPP RESULTS (NUMBERS TESTED WITH SCORES)

School Year	3 <sup>rd</sup> Grade	4 <sup>th</sup> Grade	5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade	Total
2016-2017	174	136	109	80	48	35	582
2017-2018	147	133	101	104	47	37	569
2018-2019	125	102	113	79	70	36	525
2019-2020 (No state testing)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2020-2021	158	135	116	118	122	86	735

SOURCE: FORTUNE SCHOOLS/SCOE

#### 1.6 FORTUNE CAASPP MATH RESULTS (STANDARD MET)

School Year	3 <sup>rd</sup> Grade	4 <sup>th</sup> Grade	5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade	Total
2016-2017	37.36%	32.35%	22.02%	21.25%	8.33%	14.29%	27.32%
2017-2018	40.14%	57.89%	24.75%	27.88%	31.91%	18.92%	37.26%
2018-2019	61.60%	46.08%	57.52%	25.32%	30.00%	30.55%	45.90%

School Year	3 <sup>rd</sup> Grade	4 <sup>th</sup> Grade	5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade	Total
2019-2020 (No state testing)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2020-2021	22.78%	14.07%	28.44%	15.25%	30.33%	16.28%	21.37%
Change from Prior Year	-38.82%	-32.01%	-29.08%	-10.07%	0.33%	-14.27%	-24.53%

SOURCE: FORTUNE SCHOOLS/SCOE

### 1.7 FORTUNE 11<sup>TH</sup> GRADE CAASPP RESULTS (STANDARD MET)

School Year	Grade	Number Tested	Percent Met or Above Standard
2020-2021	11	ELA – 24 Math – 23	ELA – 50% Math – 21.74%

SOURCE: FORTUNE SCHOOLS

**Expected Annual Measurable Outcome:** 100% of EL students will demonstrate progress toward English proficiency.

**Actual Annual Measurable Outcome:** The English Language Proficiency Assessments for California (ELPAC) was established in 2018 to measure students' English proficiency. In November 2018, the State Board of Education (SBE) approved new performance levels so scores from 2017-2018 to 2018-2019 are not comparable, scores from 2018-2019 to 2020-2021 are comparable.

### 1.8 FORTUNE PERFORMANCE OF ENGLISH LEARNERS ON ELPAC

Developed English Skills Level	2017-2018	2018-2019	2019-2020	2020-2021
Level 4: Well Developed	43%	13%	N/A	14%
Level 3: Moderately Developed	29%	34%	N/A	48%
Level 2: Somewhat Developed	20%	36%	N/A	32%
Level 1: Minimally Developed	9%	18%	N/A	6%

SOURCE: FORTUNE SCHOOLS

Fortune identified 5.45% of the total population (103 of 1890 students) as English Learners in 2019-2020, with 1 student identified as Reclassified Fluent English Proficient (RFEP).



## 1.9 FORTUNE ENGLISH LEARNER TRENDS FROM 2014-2015 to 2020-2021

School Year	Enrollment All Students	English Learners	English Learners %	Students Newly RFEP	Students Newly RFEP %
2014-2015	898	72	8.02%	19	33.30%
2015-2016	1,195	91	7.62%	34	47.20%
2016-2017	1,371	118	8.61%	0	0.00%
2017-2018	1,356	98	7.23%	21	17.80%
2018-2019	1,235	100	8.10%	1	1.00%
2019-2020	1,463	102	7.00%	19	19.00%
2020-2021	1,890	103	5.45%	1	1.00%

SOURCE: FORTUNE SCHOOLS/SCOE

### LCAP Goal: Culture

Cultivate a culture of high expectations for academic achievement and conduct that are clearly designed, measurable, and make no excuses based on the background of students. Students, parents, teachers, and staff create and reinforce a culture of achievement and support.

**Expected Annual Measurable Outcome:** The majority of parents who respond to the annual parent survey will say they are satisfied with their child's school. Eighty (80)% of parents will express confidence that the schools are safe and secure.

**Actual Annual Measurable Outcome:** Fortune administers an annual Parent Survey at the end of each school year. June 2019 surveys led to the annual Parent Academy. The surveys were different in 2020 as a result of COVID school closures. The survey data helped guide decision making based on needs of families, students, and staff. These surveys and ongoing communication kept the school communities informed through the summer and early fall as data about the impact of the virus in Sacramento County was analyzed, shared, and options for opening schools were evolving and changing.

### Staff Survey About Distance Learning

- June 2020 – staff reflected on spring instructional model, 99 staff, which included all principals and nearly all classroom teachers, and 25 additional staff members responded.

### Scholar Survey About Distance Learning

- June 2020 – middle and high school scholars provided feedback and reflections on their spring distance learning experiences and 474 scholars participated, which reflected virtually all scholars in grades 6 through 12.

## **School Reopening Survey**

- June 2020 – families gave the schools feedback on their preferred learning options for each of their scholars. Responses for 990 scholars were received, approximately 50% of enrollment.

## **Family Technology Survey**

- July 2020 – families provided feedback on technology needs for each of their scholars with responses for 895 scholars, approximately 40% of enrollment.

## **Learning Continuity and Attendance Plan Parent Academy**

- September 2020 – over 100 parents participated in an online Parent Academy to provide feedback on the Learning Plan for the 2020-2021 school year and provide additional recommendations.

## **June 2020 – School Reopening Family Survey**

- Responses from 990 scholars, nearly half of current total enrollment
- 23% of families initially chose the distance learning only option
- Hybrid Model – 84% of families overwhelmingly wanted in-person Monday/Tuesday morning option. The responses to questions did not vary significantly by school site or grade.

## **June 2020 – Scholar Survey About Distance Learning**

Middle and high school scholars shared their reflections on spring distance learning experiences, highlighting what worked and what did not work or challenged students' learning opportunities. Scholars reported how much they used specific aspects of distance learning, and then rated those aspects on a 5-point scale (1 = worst, 5 = best).

- Assignments: 83% of scholars said it was moderately to very easy to use Google Classroom to access and turn in assignments, and 70% said they usually or almost always turned in their assignments.
- Office Hours: Over a third of scholars attended office hours just once in a while, and nearly half never attended. Of those who attended office hours, 76% reported they were helpful.
- Videos: Over half of middle schoolers reported that videos presented information clearly, and a third found the videos interesting.
- MobyMax: Nearly half of middle schoolers used MobyMax every week. 47% reported that it was helpful, and another 28% reported that it was somewhat helpful (i.e., a rating of 3 out of 5).

## **June 2020 – Staff Survey About Distance Learning**

- Staff were asked to share reflections on spring distance learning experiences, principals and teachers responded and shared the strengths, challenges, and potential next steps.
- Between 62% and 81% of staff reported being quite or extremely satisfied with the rollout of all five components of distance learning. The lowest level of satisfaction was for Office Hours, and the highest level was for Videos.

- Between 50% and 75% of staff reported being quite or extremely satisfied with all five components' effectiveness for scholar learning. The lowest level of satisfactions was for Assignments, and the highest level was for MobyMax.

## 1.10 STAFF SURVEY RESULTS

Staff Survey Results	Videos	Assignments	Office Hours	Moby Max	Reading Eggs
Quite or Extremely Satisfied with <b>Rollout</b>	81%	70%	62%	74%	73%
Quite or Extremely Satisfied with <b>Effectiveness</b>	61%	50%	56%	75%	65%

### July 2020 – Family Technology Surveys

- Responses for 895 scholars, which is nearly 40% of current total enrollment
- Provided 100% of families one-to-one Chromebooks for the 2020-2021 school year
- Survey revealed that 8% of scholars lacked reliable internet at home
- To date, provided hot spots for 130 families

### Learning Continuity and Attendance Plan Parent Academy (September 2020)

In early September 2020, approximately 100 parents participated in an online Parent Academy to provide feedback on the Learning Continuity Plan. Multiple communications, both centrally through parent communication system ParentSquare and with principals at each site through their own channels (e.g., ClassDojo, Morning Meeting), provided information on how to participate. The Zoom meeting was held, parents provided their feedback via chat during and after the presentation, and attendees were asked to provide recommendations and comments regarding the specific actions and expenditures proposed to be included in the Learning Continuity Plan. This feedback helped guide revision to the Learning Plan.

## ATTENDANCE

**Expected Annual Measurable Outcome:** 95% attendance rate at all schools.

**Actual Annual Measurable Outcome:** The 2020-2021 attendance average rate for students enrolled in the Fortune schools was 96%, with all but one school meeting the goal. The goal was met.

Attendance continued to be a significant area of focus for the Fortune Team in 2020-2021. Distance learning required a range of virtual strategies and year-to-date statistics are posted prominently in each school as well as class incentives to improve attendance.

### 1.11 FORTUNE ANNUAL ADA 2020-2021

<b>Fortune Schools</b>	<b>Days of ADA Possible</b>	<b>Days of Actual Attendance</b>	<b>Average Daily Attendance*</b>	<b>% ADA</b>
FS	51,081	49,376	282.8	97%
WLCP	47,341	44,026	251.7	93%
ARCP	50,603	48,626	276.4	96%
EWCP	31,056	29,998	171.9	97%
HMCP	66,190	62,730	359.2	95%
FECHS	33,887	33,850	178.7	100%
TPCP	14,463	13,651	78.4	94%
FMS	29,320	29,138	165.5	99%
TOTAL	390,724	375,782	1,764.6	96%

\*119 days for all schools

SOURCE: FORTUNE SCHOOLS

### 1.12 HISTORICAL TRENDS ATTENDANCE

<b>School Year</b>	<b>Percentage</b>
2011-2012	94%
2012-2013	94%
2013-2014	95%
2014-2015	94%
2015-2016	94%
2016-2017	94%
2017-2018	95%
2018-2019	94%
2019-2020	94%
2020-2021	96%

SOURCE: FORTUNE SCHOOLS

**Expected Annual Measurable Outcome:** Chronic absenteeism is at a rate of 5% or less.

**Actual Annual Measurable Outcome:** In 2020-2021, 7.7% of Fortune students were chronically absent based on preliminary data. Statewide data for other districts are not available given the COVID disruptions. The greatest success to engagement and outreach was the implementation of a daily system of outreach to absent scholars. In the second trimester, Fortune began tracking family outreach with a system-wide Google form, contacting families over 13,000 times. Staff connected with someone 54% of the time, had incorrect contact information 6% of the time, and left a message whenever possible the remaining times. This system improved attendance, which in turn improved chronic absence rate from 18% to less than 10%.

### 1.13 FORTUNE FOUR YEAR CHRONIC ABSENCE DATA

Chronic Absenteeism Rates	Cumulative Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
2017-2018	1,356	190	14%
2018-2019	1,379	221	16%
2019-2020	1,987	382	19.2%
2020-2021	1,993	154	7.7%

SOURCE: FORTUNE SCHOOLS/CA DEPARTMENT OF EDUCATION

### SUSPENSION/EXPULSION RATES

**Expected Annual Measurable Outcome:** Student suspension rate of 2% or lower and student expulsion rates will not exceed .1%.

**Actual Annual Measurable Outcome:** Fortune had **no** suspensions or expulsions in 2020-2021, meeting their goal.

### 1.14 FORTUNE HISTORICAL SUSPENSION/EXPULSION RATES

Suspension or Expulsion	Year	Cumulative Enrollment	Suspended	Suspension Rate	Expulsions	Expulsion Rate
Fortune	2015-2016	1,263	97	7.68%	2	0.16%
Fortune	2016-2017	1,522	48	3.15%	1	0.07%
Fortune	2017-2018	1,430	67	4.69%	0	0.00%
Fortune	2018-2019	1,375	168	12.22%	2	0.15%
Fortune	2019-2020	1,987	83	4.17%	0	0.00%
Fortune	2020-2021	1,993	0	0	0	0.00%
Sacramento County	2018-2019	224,302	22,740	10.13%	202	.09%

\*2018-2019 DATA IS MOST RECENT FROM CDE

SOURCE: FORTUNE SCHOOLS/CA DEPARTMENT OF EDUCATION

## LCAP Goal: Operations

Create safe, clean, and welcoming learning environments.

Fortune reports that 100% of school sites earned a “good” rating on the State of California Facilities Inspection Tool in 2019-2020. A visit to the Fortune Educational Complex in Elk Grove housing the Rex & Margaret Fortune Early College High School, Fortune Middle School, and Alan Rowe College Prep confirms it is safe, clean, and welcoming.

### PART 2 – EVIDENCE FORTUNE IS FINANCIALLY SOUND

Fortune has consistently demonstrated sound financial management, solid budget monitoring practices, positive annual audits, and ending balances consistent with the reserve requirements of the MOU.

The MOU requires that the economic reserve for uncertainty be equivalent to 5% of the total Local Control Funding Formula (LCFF) amounts. That requirement has been met in each year of operation.

At the close of 2020-2021, the overall ending balance was 23% of expenditures. The 2021-2022 adopted budget will be revised at the First Interim Budget Revision (December 2021) to reflect actual income.

#### 2.1 FORTUNE FINANCIAL TREND DATA

Summary Budget Update	2018-2019 End of Year Actuals	2019-2020 End of Year Actuals	2020-2021 End of Year Actuals
Income	17,938,334	19,548,192	28,115,554
Expenditures	18,894,757	19,233,336	24,232,461
Income Less Expenditures	(956,423)	314,856	3,883,093
Beginning Balance	1,655,256	1,423,833	1,738,689
Ending Balance	1,423,833	1,738,689	5,621,782
Ending Balance as % of Expenses	8%	9%	23%
Prepaid Expenditures/ Commitments	116,697	347,212	267,401
Restricted	21,556	0	120,303
Unassigned	N/A	665,342	4,266,258

<b>Summary Budget Update</b>	<b>2018-2019 End of Year Actuals</b>	<b>2019-2020 End of Year Actuals</b>	<b>2020-2021 End of Year Actuals</b>
Reserve for Economic Uncertainty (5%)	610,507	726,135	967,321
LCFF Sources	12,210,132	14,522,699	19,250,050
Reserve of % of LCFF Sources (MOU – 5%)	5%	5%	5%

SOURCE: FORTUNE SCHOOLS/SCOE

An important element of school funding is the stability of the unduplicated pupil count. Supplemental and Concentration funds are generated based on this percentage. Charter schools are “capped” at the percentage of the authorizing district, or in a countywide benefit charter, capped at the highest district rate where a school is located. For Fortune, this is Twin Rivers Unified School District, which has a rate of 87%. The unduplicated pupil count percentage is based on a three-year average of students identified as Free/Reduced meal eligible, English Learner, and Foster Youth.

## **2.2 FORTUNE LCFF UNDUPLICATED PUPIL COUNT 2020-2021**

<b>School Year</b>	<b>Enrollment</b>	<b>Count*</b>	<b>Unduplicated Count as a % of Enrollment</b>
2018-2019	1,235	1,017	82.35%
2019-2020	1,463	1,150	78.61%
2020-2021	1,890	1,472	77.88%
Three Year Average	1,351	1,080	79.94%
Cap for Concentration Funds**			79.94%

\*Free/Reduced, English Learner, Foster Youth

\*\*Based on district with highest % (Twin Rivers USD)

SOURCE: FORTUNE SCHOOLS

## **PART 3 – KEY DEMOGRAPHIC DATA**

### **ADMISSIONS PROCESS, LOTTERY, CURRENT WAITING LIST FOR 2020-2021**

Per Fortune, the following describes the admissions and lottery process.

No lottery was held for the 2020-2021 school year as all students were enrolled.

For students to be admitted to Fortune in 2020-2021, they were first required to complete a Student Application in concert with their parents and submit the required documents, which include proof of birth date, proof of residency, immunization records, and physical examination (for TK/K only). If the number of applications did not exceed the capacity of the charter school, there was no lottery and all students who submitted complete applications were enrolled.

In the event that the number of students seeking admission to any grade level exceeded capacity, a lottery was held. It was completed in a public forum by pulling slips of paper with applicants' names on them out of a container. All eligible names were drawn from the container, and those exceeding the number of available spaces were placed on a waiting list in the order drawn.

Fortune may grant priority in admissions to current students and residents of Sacramento County, as provided under the law when the lottery was conducted. The school may also grant admission preference to siblings of existing pupils and children of school faculty, provided students admitted under any such preference do not constitute more than 10% of the school's total enrollment. Currently enrolled students do not participate in the random drawing, as they are automatically reserved a space for the following year.

Fortune reported a total of 1,890 students for 2020-2021 and enrollment for 2021-2022 is 1,825, a decrease of 65 students.

### 3.1 FORTUNE ENROLLMENT COUNTS

Enrollment	FS	WLCP	ARCP	EWCP	HMCP	FECHS	TPCP	FMS	TOTAL
2020-2021 Enrollment	302	287	311	180	394	185	58	173	1,890
2021-2022 Enrollment	267	253	265	175	360	205	125	175	1,825
Increase (Decrease)	-35	-34	-46	-5	-34	20	67	2	-65

Note: Enrollment is based on Census Day numbers.

SOURCE: FORTUNE SCHOOLS

### 3.2 FORTUNE ENROLLMENT PROJECTION COUNTS 2021-2022

	FS	WLCP	ARCP	EWCP	HMCP	FECHS	TPCP	FMS	TOTAL
2021-2022 Budget Projection Count	310	310	310	180	406	235	210	180	2,141
2021-2022 Enrollment	267	253	265	175	360	205	125	175	1,825
Increase (Decrease)	-43	-57	-45	-5	-46	-30	-85	-5	-316

Note: Enrollment is based on Census Day numbers.

SOURCE: FORTUNE SCHOOLS



### 3.3 FORTUNE HISTORICAL TRENDS OF STUDENT ETHNICITY THROUGH 2020-2021

Year	Total Enroll.	African American	American Indian or Alaska Native	Asian	Filipino	Hispanic or Latino	Pacific Islander	White	Two or More Races	Not Reported
2014-2015	898	60.8%	0.7%	2.9%	0.6%	22.7%	0.8%	1.6%	9.6%	0.3%
2015-2016	1,195	61.1%	0.4%	1.9%	0.3%	25.2%	0.6%	1.1%	8.5%	0.9%
2016-2017	1,371	65.1%	2.1%	2.1%	1.2%	23.6%	1.1%	1.5%	3.3%	0.0%
2017-2018	1,356	65.0%	1.6%	2.1%	0.7%	23.1%	1.0%	1.3%	5.2%	0.0%
2018-2019	1,235	62.8%	1.2%	1.9%	0.9%	25.1%	1.1%	1.1%	5.9%	0.0%
2019-2020	1,463	65.1%	1.0%	1.6%	0.9%	23.9%	0.8%	1.4%	5.3%	0.0%
2020-2021	1,890	63.5%	0.8%	1.5%	0.7%	23.9%	0.7%	1.3%	7.0%	0.5%

SOURCE: FORTUNE SCHOOLS

Fortune students reside primarily in the boundaries of four school districts (Elk Grove Unified, Sacramento City Unified, Twin Rivers Unified, and Natomas Unified). October 2020-2021 enrollment counts by ethnicity are shown below for these districts and for Fortune.

### 3.4 FORTUNE DEMOGRAPHICS COMPARED TO FOUR DISTRICTS FROM 2020-2021

<i>2020-2021 Demographics</i>	Total Enroll.	African American	American Indian or Alaska Native	Asian	Filipino	Hispanic or Latino	Pacific Islander	White	Two or More Races	Not Reported
Elk Grove	63,947	10.9%	0.4%	26.5%	5.9%	27.6%	1.8%	17.5%	9.3%	0.0%
Sac. City	45,078	13.9%	0.5%	17.0%	1.4%	41.0%	2.0%	16.4%	7.4%	0.4%
Twin Rivers	32,284	11.9%	0.7%	11.0%	0.9%	41.6%	1.4%	26.2%	4.5%	1.8%
Natomas	15,686	16.3%	0.5%	17.6%	4.7%	32.6%	1.7%	16.0%	11.0%	0.2%
Fortune	1,890	63.5%	0.8%	1.5%	0.7%	23.9%	0.7%	1.3%	7.0%	0.5%

SOURCE: CA DEPARTMENT OF EDUCATION

### FORTUNE P-2 ADA BY DISTRICT OF RESIDENCE 2020-2021

The California Department of Education (CDE) did not collect P-2 ADA for 2020-2021. In 2019-2020, Fortune had a funded P-2 ADA of 1,463. The majority of the students (93%) came from four districts: Sacramento City, Elk Grove, Twin Rivers, and Natomas.

### 3.5 FORTUNE GAINS/LOSSES BY SCHOOL SITE 2020-2021

Enrollment at the start of school in 2020-2021 was 1,792. There was a gain of 217 students and a loss of 168 students for an ending (June 2021) count of 1,841 students. Gains and losses fluctuate across schools throughout the school year so there was a net gain of 49 students for 2020-2021.

<b>Fortune Schools</b>	<b>Beginning Count</b>	<b>Gain</b>	<b>Loss</b>	<b>Ending Count</b>
FS	288	21	24	285
WLCP	258	31	24	265
ARCP	298	20	42	276
EWCP	177	6	8	175
HMCP	360	45	29	376
FECHS	185	6	16	175
FMS	177	6	20	163
TPCP	49	82	5	126
<b>TOTAL</b>	<b>1,792</b>	<b>217</b>	<b>168</b>	<b>1,841</b>
Change in 2020-2021				+49

SOURCE: FORTUNE SCHOOLS

### 3.6 FORTUNE FREE AND REDUCED LUNCH COUNTS WITH HISTORICAL TRENDS

For 2020-2021, 76% of students were identified as eligible for free and reduced meals, a slight decrease from prior year eligibility. Data for 2020-2021 will not be certified by CDE until early 2022.

<b>Fortune</b>	<b>Total Enrollment</b>	<b>Free &amp; Reduced Eligible</b>	<b>Free &amp; Reduced %</b>
2015-2016	1,195	984	82.34%
2016-2017	1,371	1,142	83.30%
2017-2018	1,356	1,062	78.32%
2018-2019	1,235	1,017	82.35%
2019-2020	1,463	1,130	77.24%
2020-2021	1,890	1,453	76.88%

SOURCE: FORTUNE SCHOOLS

### 3.7 FORTUNE SPECIAL EDUCATION PUPIL COUNTS

<b>Students with Special Needs December Count</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>
Intellectual Disability	0	0	1	5
Hard of Hearing	1	2	1	2
Speech/Language Impairment	34	54	57	56
Emotional Disturbance	1	0	1	3
Other Health Impairment	16	15	17	31
Specific Learning Disability	41	48	57	51
Autism	4	9	11	14
Traumatic Brain Injury	0	2	0	0
Total	97	130	145	162
Total Students (October Count)	1,235	1,463	1,890	1,825
% Of Population	8%	9%	8%	9%

SOURCE: FORTUNE SCHOOLS

Fortune is a member of the El Dorado County Charter Special Education Local Plan Area (SELPA). Fortune identified 8% of the population as students with special needs in 2020-2021. The K-12 statewide average (2019-2020 – most recent) was 12.9%.

### PART 4 – GENERAL INFORMATION (PREPARED BY FORTUNE)

#### 2020-2021 PROFESSIONAL DEVELOPMENT ACTIVITIES

**Distance Learning Professional Development:** The main challenge was to ensure that staff received sufficient professional development before the 2020-2021 school year began. Teachers needed to learn how to establish classroom culture and teach new content in a distance learning environment only. The central office provided two and a half weeks of professional development and planning time, including virtual meeting etiquette for scholars as well as training on how to use various virtual learning platforms. This professional development and training time was successful in giving teachers tools and confidence to have a successful start to the 2020-2021 school year.

**Staff Roles and Responsibilities:** The main challenge was to help staff who lost their work portfolio because of the shift to distance learning. Behavior technicians, for example, no longer had to manage behavior in physical classrooms. School teams successfully shifted staff to other roles, such as calling families whose scholars were absent or virtually

assisting teachers during synchronous instruction. This helped provide a rigorous distance learning experience for scholars and provided additional staff to work on learning priorities.

Fortune leverages its Administrative Services Credential and District Intern Programs in its Higher Education Department 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. The District Intern Program gives candidates the foundational coursework and support they need to launch their careers in education.

## **2020-2021 SHARED BEST PRACTICES WITH LOCAL SCHOOL DISTRICTS**

Fortune School of Education disseminates best practices through our educator preparation programs that are accredited by the California Commission on Teacher Credentialing. We partner with over 70 school systems to credential teachers and administrators. Like Fortune's charter schools, our credential programs have as their education philosophy the 5 Pillars – #1 High Expectations, #2 Choice and Commitment, #3 More Time, #4 Focus on Results, and #5 Citizenship.

From May 5-7, 2021, we participated in the NAN Western Regional Conference. As part of the event, we met and collaborated with leaders from other top-performing schools. All shared ideas about how to mitigate and reverse the learning loss that occurred since March 2020.

In November 2019, Dr. Dominic Zarecki's quantitative research on school discipline reform won the California Educational Research Association's (CERA) 2019 Outstanding Paper Award. He presented the award-winning paper at the annual CERA conference in November 2019, and he presented the research at the American Educational Research Association conference in 2021.

## **2020-2021 SUMMARY OF MAJOR DECISIONS/POLICIES ESTABLISHED BY FORTUNE BOARD**

From the 2020-2021 Board Agendas, the following actions were taken.

### **Approve Revised Corporate Bylaws – Rex & Margaret Fortune School of Education**

The revisions to the Rex & Margaret Fortune School of Education bylaws are due to new legal requirements pursuant to SB 126 (effective 1/1/2020), which added Education Code section 47604.1. SB 126 expressly requires charter schools and an entity managing a charter school must comply with the Brown Act, Public Records Act, Political Reform Act, and Government Code section 1090. SB 126 also identifies specific requirements pertaining to Board Meetings for entities managing charter schools.

## **Other major decisions:**

### **Approve Revised Conflict of Interest Code – Rex & Margaret Fortune School of Education**

The original language found on the cover page of Fortune School of Education's Conflict of Interest Policy did not change. On the second page of the policy, Appendix A: Designated Positions, "Consultants/New Positions" along with the explanatory paragraph was added, consistent with Political Reform Act requirements to account for consultants or new positions. In addition, the Chief Academic Officer was added to the designated positions list.

### **Building Update**

Rex and Margaret Fortune Early College High, Fortune Middle, and Alan Rowe College Prep schools moved into the completed building complex in Elk Grove.

### **2019-2020 DATA ON PARENTAL INVOLVEMENT IN GOVERNANCE AND OPERATION OF SCHOOLS**

Fortune School currently operates one School Site Council (SSC). The SSC composition is based on the elementary and high school composition requirements pursuant to Title I, Part A. The composition for the SSC consists of one (1) administrator, three (3) classroom teachers, one (1) other school staff member, five (5) parents or community members and one (1) student. The SSC meets a minimum of four times throughout the year. Its primary duty is to write, monitor, evaluate, and approve the School Plan for Student Achievement (SPSA), which is submitted to Fortune School of Education's governing board for adoption. The school site council also provides feedback on the LCAP revision process.

### **HIGHLIGHTS FROM FORTUNE 2021-2024 LCAP (REQUIRED BY MOU WITH SCOE)**

#### **LCAP 2021-2024**

The 2021-2024 LCAP goals: (1) maintain classrooms that close the achievement gap, (2) support schools that are safe, aligned with state standards and welcoming, and (3) nurture communities of engagement and support. Three comprehensive actions are being implemented to reach goals: continue to implement a longer school day and year, including summer school; continue to invest heavily in professional development to increase teachers' knowledge and skills and training instructional assistants to provide in-person, small group support throughout the school year; and continue to conduct Parent Academies to empower families to monitor and assist the academic progress of their own scholars.

#### **STAKEHOLDER FEEDBACK**

Fortune School continuously engages with stakeholders throughout the school year and held meetings with all stakeholders on review and feedback on the LCAP during the annual review process. Stakeholder feedback guides budget decisions and provides feedback on specific needs of each school site and the larger organizational priorities. Fortune continues to implement systems across all schools to use data to inform instruction and help guide decisions. A regular system of teacher and administrator communications is in place to review grade-level student achievement data, select interventions needed for specific groups of students, schedule weekly faculty meetings, and establish other school level or organization wide task groups working on new priorities as they emerge.

Overall feedback emphasized a deep appreciation for the instruction and support to scholars during the tumultuous 2020-2021 school year. Teachers and staff were extremely appreciative of staff compensation after a salary freeze in summer 2020. When the state adjusted the education budget due to higher-than-expected state revenues, a retroactive raise was given to all staff. In a confidential survey, a majority of teachers and staff expressed satisfaction with school climate, leadership, and feedback and coaching. Parents expressed difficulty with aspects of the technology used for distance learning. Other stakeholders agreed that it was a good idea to institute a summer school program to help some students get caught up academically.

In the early fall of 2021, Fortune created and administered two surveys to obtain input from students and families. The surveys were open from October 1-7, and available to all primary contacts and scholars in grades 4-12. The questions asked about perspectives concerning four distinct needs: academic learning, creative outlets, social-emotional wellness, and physical safety (related to COVID-19).

The scholar survey received 154 responses, and the parent survey received 501 responses. For parent surveys, 33 were in Spanish and 3 were in Hindi. The responses reflected the perspective of parents of several student groups:

- 401 were parents of low-income students
- 26 were parents of English learners
- 36 were parents of students with disabilities
- 289 were parents of African American students
- 121 were parents of Latino students

### **Academic Learning**

- 65% of parents were moderately or very concerned about their scholars' academic growth
- 70% of parents thought their scholars were learning as much or more this year as two years ago (before COVID-19)
- 75% of scholars thought they were learning as much or more this year as two years ago (before COVID-19)
- Scholars scored higher than the pre-pandemic state average on questions about Academic Motivation

### **Creative Outlets**

- 92% of parents were moderately or very concerned about their scholars' need for creative outlets
- 38% of students felt that they get to be sufficiently creative in classes like art or music
- 53% of parents were moderately or very concerned about their scholars' social-emotional well-being
- Scholars scored somewhat lower than the pre-pandemic statewide average on questions about School Connectedness, Caring Relationships, and Opportunities for Meaningful Participation

## Health Risks of COVID-19

- 80% of scholars reported knowing and practicing COVID-19 safety measures at all times while in school
- 79% of parents were moderately or very aware of the COVID-19 safety measures

The most noteworthy finding was that parents overwhelmingly were concerned about the need for creative outlets, and students were relatively unlikely to feel that they were able to be sufficiently creative in classes like art and music. This led Fortune to focus on enhancing music and art programs and adding performances for scholars to highlight their creative work.

## FORTUNE LCAP GOALS AND ANNUAL MEASURABLE OUTCOMES STATUS 2020–2021

### LCAP Goal 1:

Improve and support student learning to close the achievement gap by providing high-quality classroom instruction that raises rigor to a college-ready bar.

Annual Measurable Outcomes	Status
1.1 100% of teachers are appropriately credentialed for their assignment.	Met
1.2 100% of students will have standards-aligned instructional materials in English Language Arts/English Language development, Math, Science, and Social Studies.	Met
1.3 100% of teachers will have weekly planning time for the implementation of Common Core.	Met
1.4 100% of teachers will participate in a robust program of professional development on Common Core aligned instructional materials for English Language Arts and English Language Development.	Partially Met
1.5 100% of teachers will have professional development on Next Generation Science Standards (NGSS).	Met
1.6 100% of students will have a visual or performing arts experience each year.	Met
1.7 Increase the percentage of students meeting or exceeding state standards in Math and ELA by 5%.	Not Met
1.8 Maintain an increase of students meeting or exceeding state standards in science.	COVID Interruption
1.9 100% of EL students will demonstrate progress towards English Proficiency.	Partially Met

<b>Annual Measurable Outcomes</b>	<b>Status</b>
1.10 100% of middle school students will take Spanish as an elective.	Met
1.11 100% of students will participate in community service projects, an annual African American history program, and fourth grade students will participate in field lessons on state history to enhance the social studies curriculum.	COVID Interruption

## **LCAP Goal 2:**

Cultivate a culture of high expectations for academic achievement and conduct that are clearly designed, measurable, and make no excuses based on the background of students. Students, parents, teachers, and staff create and reinforce a culture of achievement and support.

<b>Annual Measurable Outcomes</b>	<b>Status</b>
2.1 100% of students have the opportunity to attend a college field lesson each year.	Partially Met
2.2 Continue to have a fully functioning School Site Council to ensure parent input and decision making.	Met
2.3 Develop a parent education program that supports having a 95% attendance rate at all schools.	Met
2.4 Chronic absenteeism is a rate at or below 5%.	Not Met
2.5 Middle school drop-out rate of zero percent and a high school drop-out rate lower than the statewide high school drop-out rate.	Met
2.6 Student suspension rate of 2% or lower and student expulsion rates will not exceed 1%.	Met
2.7 100% of parents will sign a Commitment to Excellence Contract that they will provide 40 or more completely voluntary service hours per academic year, ensure that their child will participate in extended learning as determined by faculty. (There is no consequence to families if they do not complete the voluntary parent service.)	Met
2.8 Over 50% of parents who respond to the annual parent survey will say they are satisfied with their child's school.	Met



**LCAP Goal 3:**

Create safe, clean, and welcoming learning environments.

<b>Annual Measurable Outcomes</b>		<b>Status</b>
3.1	100% of school sites will earn a “good” rating on the State of California Facilities Inspection Tool.	Met
3.2	80% of parents surveyed will express confidence that the schools are safe and secure.	Met
3.3	Over 50% of teachers surveyed will say their school site is safe and secure.	Met
3.4	A majority of students surveyed will say their school site is safe and secure.	Met