

PUBLIC DISCLOSURE COPY

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CHI CAGO PUBLIC EDUCATI ON FUND		36- 4279013
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HEATHER Y. ANI CHI NI , PRESIDENT & CHIEF EXECUTIVE OFFICER

KEVIN FUQUA, CPA, CVA		Afcai gd qcid+cknfmwcb	P00433011
CHERRY BEKAERT ADVISORY LLC		88- 2730877	
1707 N. RANDALL ROAD, STE 200			
ELGIN, I L 60123		847- 888- 8600	

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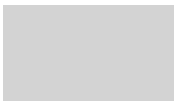
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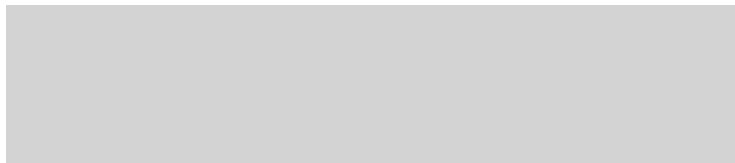
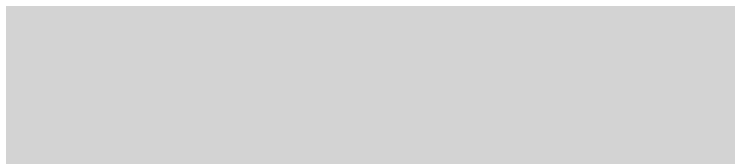
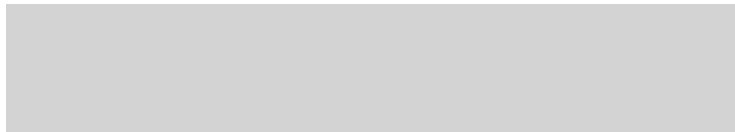
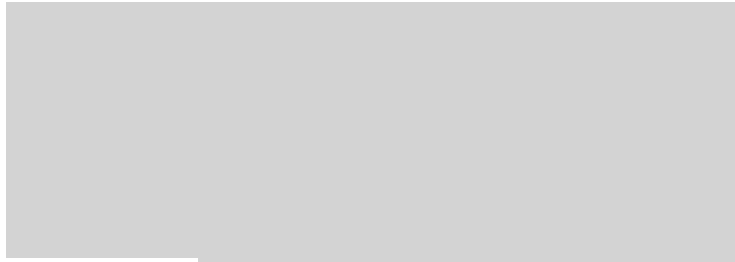
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SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

OTHER INCOME

2019 AMOUNT: \$ 3,120.

2023 AMOUNT: \$ 2,874.

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PART II - B, SECTION 501(H) AVERAGING STATEMENT:

FUND TEAM MEMBERS HELD MEETINGS WITH ILLINOIS GENERAL ASSEMBLY MEMBERS AND THEIR STAFF MEMBERS TO DISCUSS LEGISLATION THAT MIGHT IMPACT PRINCIPAL QUALITY IN CHI CAGO' S PUBLI C SCHOOLS. THE FUND ALSO EMPLOYED A LEGI SLATI VE CONSULTANT TO PROVI DE SERVI CES SUCH AS EDUCATI ON-RELATED BI LL TRACKI NG, MATERI AL DEVELOPMENT, AND OUTREACH.

CHI CAGO PUBLI C EDUCATI ON FUND

36- 4279013

OF THE CHI CAGO PUBLIC EDUCATION FUND AND ITS PROGRAMMATIC ACTIVITY OVER THE LONG TERM

PART X, LINE 2:

THE ACCOUNTING STANDARD RELATED TO UNCERTAINTY IN INCOME TAXES STATES THE FUND MAY RECOGNIZE THE TAX BENEFIT FROM AN UNCERTAIN TAX POSITION ONLY IF IT IS MORE LIKELY THAN NOT THE TAX POSITION WILL BE SUSTAINED ON EXAMINATION BY TAXING AUTHORITIES, BASED ON THE TECHNICAL MERITS OF THE POSITION.

EXAMPLES OF TAX POSITIONS INCLUDE THE TAX-EXEMPT STATUS OF THE FUND AND THE VARIOUS POSITIONS RELATED TO THE POTENTIAL SOURCES OF UNRELATED BUSINESS TAXABLE INCOME. THE TAX BENEFITS RECOGNIZED IN THE FINANCIAL STATEMENTS FROM SUCH A POSITION ARE MEASURED BASED ON THE LARGEST BENEFIT THAT HAS A GREATER THAN 50% LIKELIHOOD OF BEING REALIZED UPON ULTIMATE SETTLEMENT.

THE FUND DOES NOT BELIEVE THERE ARE ANY UNRECOGNIZED TAX BENEFITS OR TAX LIABILITIES THAT SHOULD BE RECORDED FOR THE REPORTING PERIODS PRESENTED IN THESE FINANCIAL STATEMENTS.

CHI CAGO PUBLIC EDUCATION FUND

36- 4279013

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SEE PART IV FOR COLUMN (H) DESCRIPTIONS

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PART I, LINE 2:

THE FUND MAKES INVESTMENTS IN GRANTEES ACCORDING TO BENCHMARK SCHEDULES.

GRANT DOLLARS ARE DISBURSED ONLY UPON DOCUMENTED EVIDENCE THAT THE PROJECTS

ARE MEETING OR WORKING TOWARDS MEETING THE CRITICAL FACTORS FOR THE

PROJECTS TO BE SUCCESSFUL. ACCEPTABLE ACHIEVEMENTS ARE JOINTLY AGREED UPON

AT THE TIME THE FUND COMMITS TO THE GRANT, AND STAFF MEMBERS WORK WITH THE

GRANTEE TO MONITOR AND DOCUMENT PROGRESS AGAINST THESE SHARED GOALS.

PART II, LINE 1, COLUMN (H):

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NAME OF ORGANIZATION OR GOVERNMENT: ACCELERATE INSTITUTE

(H) PURPOSE OF GRANT OR ASSISTANCE: SUPPORT FOR LEADERSHIP BRIDGE

INCLUDING A SUMMER INSTITUTE AND COACHING FOR PRINCIPAL AND ASSISTANT

PRINCIPAL PAIRS, AND A COMMUNITY OF PRACTICE TO DEVELOP SUCCESSION PLANS.

NAME OF ORGANIZATION OR GOVERNMENT: THE MODERN CLASSROOMS PROJECT

(H) PURPOSE OF GRANT OR ASSISTANCE: TRAINING AND COACHING OF PLC LEADERS

TO LEVERAGE TECHNOLOGY IN STUDENT-CENTERED CLASSROOMS.

NAME OF ORGANIZATION OR GOVERNMENT: UNIVERSITY OF WASHINGTON

(H) PURPOSE OF GRANT OR ASSISTANCE: PROVOQNQNQEON

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PART I, LINE 7:

THE FUND OFFERED BONUSES OR STIPENDS TO THREE (3) EMPLOYEES IN 2023.

STIPENDS WERE OFFERED TO EMPLOYEES WHO WORKED ON SPECIAL PROJECTS THAT WENT

ABOVE AND BEYOND THEIR REGULAR DUTIES. BONUSES WERE OFFERED AT THE

DISCRETION OF THE BOARD OF DIRECTORS FOR EXTRAORDINARY PERFORMANCE. THE

PROCESS FOR THE DISTRIBUTION OF STIPENDS IS SHARED WITH EMPLOYEES.



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SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

- (A) NAME OF PERSON: W SE LEADERSHI P CONSULTING
- (D) DESCRIPTION OF TRANSACTI ON: PROGRAM SUPPORT FEES FOR THE LAUNCH OF MALOTT FELLOWSHI P

PART IV

THE FOUNDING PARTNER OF W SE LEADERSHI P CONSULTING, WHI CH PROVID ED PROGRAM SUPPORT FOR THE LAUNCH OF THE MALOTT FELLOWSHI P PROGRAM I N 2023, IS RELATED TO THE DI RECTOR OF PARTNERSHI P AND I NNOVATI ON, A KEY EMPLOYEE OF THE FUND. THE FUND PAID \$150,000 TO W SE LEADERSHI P CONSULTING FOR PROVIDI NG PROGRAM SUPPORT.

CHI CAGO PUBLIC EDUCATI ON FUND

36- 4279013

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SCHEDULE M PART I, COLUMN (B):

REPORTING NUMBER OF CONTRIBUTIONS.

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FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

TOOLS TO FOCUS ON TEACHING AND LEARNING AND IMPROVE SCHOOLS. IN 2023,
 THE FUND LAUNCHED PROGRAMMING FOR CHICAGO LEADS, A 50 MILLION DOLLAR
 CAMPAIGN DESIGNED TO SUPPORT STRONG LEADERS IN SCHOOLS CITYWIDE. IN THE
 2022-23 SCHOOL YEAR, OUR PROGRAMS AND PARTNERSHIPS SUPPORTED 333
 LEADERS ACROSS 253 SCHOOLS. OVER HALF OF OUR PARTICIPANTS WERE LEADERS
 OF COLOR: 44.4% IDENTIFIED AS BLACK AND 14.1% IDENTIFIED AS LATINO/A/X.
 WE CONTINUOUSLY ENGAGE LOCAL LEADERS IN OUR WORK. OUR EDUCATOR ADVISORY
 COMMITTEE AND LOCAL SCHOOL COUNCIL FOCUS GROUP ADVISED US ON ASPECTS OF
 FOUR REPORTS IN 2023. EACH PUBLISHED REPORT SHARES INFORMATION ON
 SCHOOL PRACTICES DESIGNED TO AMPLIFY STUDENT LEARNING.

FORM 990, PART III, LINE 2, NEW PROGRAM SERVICES:

IN 2023, THE FUND LAUNCHED TWO NEW PILOT PROGRAMS. ONE, THE MALOTT
 EDUCATOR FELLOWSHIP, IS A TWO-YEAR LEADERSHIP DEVELOPMENT PROGRAM THE
 FELLOWSHIP PROVIDES A LEARNING COMMUNITY AND TARGETED COACHING TO
 SUPPORT THE UNIQUE NEEDS OF STRONG LEADERS IN SCHOOL COMMUNITIES
 EXPERIENCING CHALLENGES LIKE HIGH ABSENTEEISM STUDENT MOBILITY, AND
 HOUSING INSECURITY. THE OTHER, OUR AFFINITY GROUPS PROGRAM PROVIDES
 BLACK AND LATINO/A/X ASPIRING LEADERS WITH A ROBUST PROFESSIONAL
 NETWORK, ONE-ON-ONE COACHING OPPORTUNITIES, AND TARGETED PROFESSIONAL
 DEVELOPMENT TO ACCELERATE THEIR PATHS TO SCHOOL LEADER ROLES. THESE
 PROGRAMS SUPPORT OUR STRATEGIC GOALS OF INCREASING PRINCIPAL
 SATISFACTION AND RETENTION AND STRENGTHENING AND DIVERSIFYING THE
 SCHOOL LEADER PIPELINE IN CHICAGO.

LOCAL SCHOOL COUNCIL (LSC) MEMBERS. WE LAUNCHED THIS FIRST-OF-ITS-KIND SURVEY IN OCTOBER 2023 TO LEARN MORE ABOUT LSC MEMBER SATISFACTION AND NEEDS FOR SUPPORT.

WE ALSO PUBLISHED FOUR REPORTS IN 2023, INCLUDING "THE ILLINOIS PRINCIPAL: THEIR WORK, THEIR CHALLENGES, THEIR IMPACT." WE WROTE THIS REPORT IN PARTNERSHIP WITH THE ILLINOIS PRINCIPALS ASSOCIATION, A STATEWIDE MEMBERSHIP ORGANIZATION AIMING TO DEVELOP, SUPPORT, AND ADVOCATE FOR INNOVATIVE EDUCATIONAL LEADERS. THE REPORT INCLUDED DATA ON ILLINOIS PRINCIPALS, OFFERING INSIGHT INTO THEIR ROLES AND RESPONSIBILITIES. IT ALSO HIGHLIGHTED THE STORIES OF LEADERS STATEWIDE TO DEMONSTRATE THE URGENT NEED FOR MORE LOCAL-LEVEL DECISION-MAKING IN CHI CAGO AND BEYOND.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:
THE BOOK'S AUTHORS, CHI CAGO PUBLIC SCHOOLS CEO PEDRO MARTINEZ, AND THE ACADEMY GROUP CEO GREG JONES.

IN OCTOBER, THE FUND CELEBRATED EDUCATORS CITYWIDE THROUGH OUR ANNUAL PRINCIPAL APPRECIATION CAMPAIGN. THE CAMPAIGN INCLUDED A SCHOOL VISIT, FREE TICKETS FOR PRINCIPALS TO ATTEND A CHI CAGO BULLS GAME, AND ONE EVENT AT THE FIELD MUSEUM THAT FEATURED STORIES FROM TRANSFORMATIONAL SCHOOL LEADERS. WE ALSO EXECUTED A SOCIAL MEDIA CAMPAIGN AND PARTNERED WITH THE CHI CAGO TRANSIT AUTHORITY TO FEATURE EXTRAORDINARY SCHOOL LEADERS IN ADS ON BUSES AND TRAINS IN THE CITY.

IN LATE 2023, WE WELCOMED A NEW EDUCATOR ADVISORY COMMITTEE, WHOSE MEMBERS CONSULTED ON OUR WORK. COMPOSED OF 36 PRINCIPALS AND ASSISTANT

PRINCIPALS, THE COMMITTEE AIMS TO SHAPE THE FUND'S POLICY AGENDA, OFFER RECOMMENDATIONS ON PROGRAMMING, AND FACILITATE CONNECTIONS WITH OTHER LEADERS ACROSS THE CITY. IT ALSO SPECIFICALLY FOCUSED ON CO-CREATING THE CRITERIA, DESIGN, AND IMPLEMENTATION OF AWARDS FOR SCHOOL LEADERS THAT WILL LAUNCH IN 2024. THE ANTICIPATED OUTCOME OF OUR CURRENT EDUCATOR ADVISORY COMMITTEE IS TO LEVERAGE THE INSIGHTS AND EXPERIENCES OF SCHOOL LEADERS TO ENHANCE THE FUND'S INITIATIVES AND STRENGTHEN THE COMMUNITY OF EDUCATIONAL LEADERS IN THE CITY.

FORM 990, PART VI, SECTION A, LINE 2:

JOHN DUGENSKE AND SIDDHARTH MEHTA HAVE A BUSINESS RELATIONSHIP.

FORM 990, PART VI, SECTION B, LINE 11B:

THE CHIEF EXECUTIVE OFFICER REVIEWS THE COMPLETED FORM 990. THEN, IT IS EMAILED IN FINAL FORM TO THE GOVERNANCE, OPERATIONS, FINANCE, AND AUDIT COMMITTEE, AS WELL AS TO THE ENTIRE BOARD OF DIRECTORS, FOR THEIR REVIEW AND COMMENTS. FINALLY, IT IS FILED WITH THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

OFFICERS, DIRECTORS, AND KEY EMPLOYEES COMPLETE A QUESTIONNAIRE TO DISCLOSE ANNUALLY ANY BUSINESS TRANSACTIONS OR RELATIONSHIPS THEY OR A FAMILY MEMBER MAY HAVE HAD WITH THE FUND OR ANY OF ITS OFFICERS, DIRECTORS, OR KEY EMPLOYEES. POTENTIAL CONFLICTS NOTED IN THE RESPONSES ARE PASSED ALONG TO THE CHIEF EXECUTIVE OFFICER (CEO) FOR REVIEW AND, WHEN NECESSARY, REFERRED TO THE EXECUTIVE COMMITTEE FOR CONSIDERATION. IN ADDITION TO THE REQUIRED ANNUAL CONFLICT OF INTEREST QUESTIONNAIRE, THE FUND'S BOARD OF DIRECTORS' POLICY COVERING CONFLICTS OF INTEREST PROVIDES THAT DIRECTORS AND STAFF HAVE THE RESPONSIBILITY TO IMMEDIATELY DISCLOSE POTENTIAL CONFLICTS OF

CHI CAGO PUBLI C EDUCATI ON FUND

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PERI OD OF DI SCLOSURE AS SET FORTH I N I RC SECTI ON 6104(D).