



# Renewal Recommendation Report Eugenio Maria de Hostos Charter School

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The State University of New York

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# INTRODUCTION

This report is the primary means by which the SUNY Charter Schools Institute (the “Institute”) transmits to the State University of New York Board of Trustees (the “SUNY Trustees”) its findings and recommendations regarding a school’s Application for Charter Renewal, and more broadly, details the merits of a school’s case for renewal. The Institute has created and issued this report pursuant to the *Policies for the Renewal of Not-For-Profit Charter School Education Corporations and Charter Schools Authorized by the Board of Trustees of the State University of New York* (the “SUNY Renewal Policies”) (revised September 4, 2013 and available at:

<http://www.newyorkcharters.org/wp-content/uploads/SUNY-Renewal-Policies.pdf>).

Additional information about the SUNY renewal process and an overview of the requirements for renewal under the New York Charter Schools Act of 1998 (as amended, the “Act”) are available on the Institute’s website at: <http://www.newyorkcharters.org/operate/existing-schools/renewal/>.

# SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

## EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

### BACKGROUND

Opened in September 2000, the Eugenio Maria de Hostos Charter School (“Eugenio”) is now in its 15<sup>th</sup> year of operation educating public school students in Rochester. Student fluency and proficiency in both English and Spanish is a focus of the school’s dual-language program. Eugenio is affiliated with the not-for-profit Ibero-American Action League, Inc. in Rochester, which renovated its original school building, but remains an independent not-for-profit education corporation.

The school currently serves 400 students in grades K-8 in private facilities at 1069 Joseph Avenue (Grades K-3) and 938 Clifford Avenue (Grades 4-8), Rochester, NY within the Rochester City School District.

### EXECUTIVE SUMMARY

Eugenio is an academic success. Throughout the Accountability Period, the school met or came close to meeting its key Accountability Plan goals in English language arts (“ELA”) and mathematics based on the school’s comparative and growth measures under each goal. Eugenio met its math goal in each year of the Accountability Period; the school’s math performance has remained consistent with scores exceeding the local district’s by at least 28 percentage points. The school also consistently outperformed the local district in ELA during each year in its five-year Accountability Period. Although the school’s performance has declined somewhat in recent years, Eugenio continues to post sufficient ELA performance and strong performance in mathematics. The school met its science and NCLB goals throughout the Accountability Period.

Eugenio plans to more than double its current size in the next charter term in response to parent demand for high quality seats in Rochester. The school plans to add one high school grade per year beginning with the 2016-17 school year and will double the number of students it serves in Kindergarten through 4<sup>th</sup> grade.

# RENEWAL RECOMMENDATION

## RECOMMENDATION: FULL-TERM RENEWAL

The Institute recommends that the SUNY Trustees approve the Application for Charter Renewal of Eugenio Maria de Hostos Charter School for a period of five years with authority to provide instruction to students in Kindergarten through 12<sup>th</sup> grade in such configuration as set forth in its Application for Charter Renewal, with a projected total enrollment of 936 students.

To earn a Subsequent Full-Term Renewal, a school must have met or come close to meeting its academic Accountability Plan goals during the Accountability Period.<sup>1</sup>

## REQUIRED FINDINGS

In addition to making a recommendation based on a determination of whether the school has met the SUNY Trustees' specific renewal criteria, the Institute makes the following findings required by the Act:

- The school, as described in the Application for Charter Renewal meets the requirements of the Act and all other applicable laws, rules and regulations;
- The education corporation can demonstrate the ability to operate the school in an educationally and fiscally sound manner in the next charter term; and,
- Given the programs it will offer, its structure and its purpose, approving the school to operate for another five years is likely to improve student learning and achievement and materially further the purposes of the Act.<sup>2</sup>

As required by Education Law § 2851(4)(e), a school must include in its renewal application information regarding the efforts it has, and will, put in place to meet or exceed SUNY's enrollment and retention targets for students with disabilities, English language learners ("ELLs"), and students who are eligible applicants for the federal Free and Reduced Price Lunch ("FRPL") program. SUNY<sup>3</sup> and the Board of Regents finalized the methodology for setting targets in October 2012, and the Institute communicated specific targets or proposed targets for each school in July 2013.

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<sup>1</sup> SUNY Renewal Policies at p.14.

<sup>2</sup> See New York Education Law § 2852(2).

<sup>3</sup> SUNY Trustees' Charter Schools Committee resolution dated October 2, 2012.

# RENEWAL RECOMMENDATION

Given the date the school was originally chartered, it does not have statutory targets. However, in accordance with the Act, the Institute, acting on behalf of the SUNY Trustees, considered the school's plans for meeting its future enrollment and retention targets during the next charter term prior to recommending the renewal application for approval. The Institute found the plans to meet or exceed the targets, and the plans to educate students with disabilities, ELLs and FRPL students, satisfactory. The Institute also found the school to be making good faith efforts to attract and retain such students in accordance with the Act.

## CONSIDERATION OF SCHOOL DISTRICT COMMENTS

In accordance with the Act, the Institute notified the district in which the charter school is located regarding the school's Application for Charter Renewal. As of the date of this report, the Institute has received no district comments in response.

# RENEWAL RECOMMENDATION

## REPORT FORMAT

The Institute makes the foregoing renewal recommendation based on the school's Application for Charter Renewal, evaluation visits conducted and information gathered during the charter term and a renewal evaluation visit conducted near the end of the current charter term. Additionally, the Institute has reviewed the strength and fiscal health of the not for profit education corporation with the authority to operate the school. Most importantly, the Institute analyzes the school's record of academic performance and the extent to which it has met its academic Accountability Plan goals. This renewal recommendation report compiles the evidence below using the SUNY Renewal Benchmarks, which specify in detail what a successful school should be able to demonstrate at the time of the renewal review. The Institute uses the four interconnected renewal questions below for framing benchmark statements to determine if a school has made an adequate case for renewal.

1. Is the school an academic success?
2. Is the school an effective, viable organization?
3. Is the school fiscally sound?
4. If the SUNY Trustees renew the education corporation's authority to operate the school, are its plans for the school reasonable, feasible and achievable?

The report's Appendix provides a School Overview, copies of any school district comments on the Application for Charter Renewal, the SUNY Fiscal Dashboard information for the school, and, if applicable, its education corporation and additional evidence on student achievement contained in the School Performance Summaries.

# RENEWAL BENCHMARK CONCLUSIONS

## IS THE SCHOOL AN ACADEMIC SUCCESS?

Eugenio is an academic success given its record of meeting or coming close to meeting its Accountability Plan goals and based on evidence about the soundness of the educational program compiled on school evaluation visits during the charter term and at the time of the renewal review using the SUNY Renewal Benchmarks.<sup>4</sup>

At the beginning of the Accountability Period,<sup>5</sup> the school developed and adopted an Accountability Plan that set academic goals in the key subjects of ELA and math. The Institute examines results for five required Accountability Plan measures to determine ELA and math goal attainment. Because the Act requires charters be held “accountable for meeting measurable student achievement results”<sup>6</sup> and states the educational programs at a charter school must “meet or exceed the student performance standards adopted by the board of regents”<sup>7</sup> for other public schools, SUNY’s required accountability measures rest on performance as measured by state wide assessments. Historically, SUNY’s required measures include measures that present schools’:

- absolute performance, i.e., what percentage of students score at a certain proficiency on state exams;
- comparative performance, i.e., how did the school do as compared to schools in the district and schools that serve similar populations of economically disadvantaged students?; and,
- growth performance, i.e., how well did the school do in catching students up – and then keeping them up to grade level proficiency?

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. Eugenio did not propose or include any additional measures of success in the Accountability Plan it adopted.

Because of testing changes made by the state, the Institute has since 2009 consistently de-emphasized the two absolute measures under each goal in schools’ Accountability Plans. The Institute continues to focus primarily on the two comparative measures and the growth measure for each goal while also considering any additional evidence the school presents using additional measures identified in its Accountability Plan. The Institute identifies the required measures (absolute proficiency, absolute Annual Measurable Objective attainment,<sup>8</sup> comparison to local

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<sup>4</sup> The *State University of New York Charter Renewal Benchmarks* (version 5.0, the “SUNY Renewal Benchmarks”) available at: <http://www.newyorkcharters.org/wp-content/uploads/SUNY-Renewal-Benchmarks.pdf>.

<sup>5</sup> Because the SUNY Trustees make a renewal decision before student achievement results for the final year of a charter term become available, the Accountability Period ends with the school year prior to the final year of the charter term. In the case of Subsequent Renewal, the Accountability Plan covers the last year of the previous charter term through the second to last year of the charter term under review.

<sup>6</sup> Education Law § 2850(2)(f).

<sup>7</sup> Education Law § 2854(1)(d).

<sup>8</sup> While the New York State Education Department (“NYSED”) has recalibrated the absolute Annual Measurable Objective, the Institute reports only on the 2013-14 results, not on those for 2012-13.

## RENEWAL BENCHMARK CONCLUSIONS

district, comparison to demographically similar schools, and student growth) in the Performance Summaries appearing in the Appendix at the end of the report.

The Accountability Plan also includes science and No Child Left Behind Act (“NCLB”) goals. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. Please note that for schools located in New York City, the Institute uses the Community School District (“CSD”) as the local school district.

**Academic Attainment.** Throughout the Accountability Period, Eugenio has met or come close to meeting its key Accountability Plan goals in ELA and mathematics based on the school’s comparative and growth measures under each goal. The school consistently outperformed the local district in both ELA and mathematics during each year in its five-year Accountability Period. Although the school’s performance dipped with the change in state assessments, Eugenio continues to post sufficient ELA performance and strong performance in mathematics. The school met its science and NCLB goals throughout the Accountability Period.

Beginning in 2009-10 and throughout 2011-12, Eugenio’s ELA performance consistently far exceeded its comparative and growth targets. During this time, the Institute’s effect size analysis indicates that the school performed higher than expected to a large degree relative to other schools statewide that serve the same grades and that are similarly economically disadvantaged. During 2012-13, the school performed comparatively as expected and, in contrast to previous years, Eugenio performed slightly lower than expected relative to demographically similar schools during 2013-14. Notwithstanding, the school came close to meeting its ELA goal during that year.

The school’s math performance has remained consistently strong throughout the Accountability Period with scores exceeding the local district’s by at least 28 percentage points. The school met its mathematics goal during every year in the Accountability Period. According to the Institute’s effect size, the school performed higher than expected to at least a meaningful degree during all five years in the Accountability Period.

# RENEWAL BENCHMARK CONCLUSIONS

DESCRIPTION	ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL	MATHEMATICS ACCOUNTABILITY PLAN GOAL																								
<p><b>Comparative Measure: District Comparison.</b> Each year, the percent of students enrolled at Eugenio in at least their second year performing at or above proficiency in <b>ELA</b> and <b>mathematics</b> will be greater than that of students in the same tested grades in the <b>local school district</b>.</p>	<table border="1"> <caption>ELA District Comparison Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>20</td></tr> <tr><td>2011</td><td>27</td></tr> <tr><td>2012</td><td>21</td></tr> <tr><td>2013</td><td>22</td></tr> <tr><td>2014</td><td>20</td></tr> </tbody> </table>	Year	Value	2010	20	2011	27	2012	21	2013	22	2014	20	<table border="1"> <caption>Mathematics District Comparison Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>36</td></tr> <tr><td>2011</td><td>32</td></tr> <tr><td>2012</td><td>27</td></tr> <tr><td>2013</td><td>33</td></tr> <tr><td>2014</td><td>45</td></tr> </tbody> </table>	Year	Value	2010	36	2011	32	2012	27	2013	33	2014	45
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<p><b>Comparative Measure: Effect Size.</b> Each year, Eugenio will exceed its predicted level of performance by an Effect Size of 0.3 or above in <b>ELA</b> and <b>mathematics</b> according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.</p>	<table border="1"> <caption>ELA Effect Size Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>1.11</td></tr> <tr><td>2011</td><td>1.22</td></tr> <tr><td>2012</td><td>0.56</td></tr> <tr><td>2013</td><td>0.00</td></tr> <tr><td>2014</td><td>-0.08</td></tr> </tbody> </table>	Year	Value	2010	1.11	2011	1.22	2012	0.56	2013	0.00	2014	-0.08	<table border="1"> <caption>Mathematics Effect Size Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>1.63</td></tr> <tr><td>2011</td><td>1.60</td></tr> <tr><td>2012</td><td>1.15</td></tr> <tr><td>2013</td><td>0.51</td></tr> <tr><td>2014</td><td>0.90</td></tr> </tbody> </table>	Year	Value	2010	1.63	2011	1.60	2012	1.15	2013	0.51	2014	0.90
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<p><b>Comparative Growth Measure: Mean Growth Percentile.</b> Each year, Eugenio's unadjusted mean growth percentile for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile in <b>ELA</b> and <b>mathematics</b>.</p>	<table border="1"> <caption>ELA Mean Growth Percentile Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>60.5</td></tr> <tr><td>2011</td><td>59.0</td></tr> <tr><td>2012</td><td>49.1</td></tr> <tr><td>2013</td><td>47.7</td></tr> <tr><td>2014</td><td>50.9</td></tr> </tbody> </table>	Year	Value	2010	60.5	2011	59.0	2012	49.1	2013	47.7	2014	50.9	<table border="1"> <caption>Mathematics Mean Growth Percentile Data</caption> <thead> <tr><th>Year</th><th>Value</th></tr> </thead> <tbody> <tr><td>2010</td><td>54.0</td></tr> <tr><td>2011</td><td>50.0</td></tr> <tr><td>2012</td><td>62.8</td></tr> <tr><td>2013</td><td>56.2</td></tr> <tr><td>2014</td><td>55.0</td></tr> </tbody> </table>	Year	Value	2010	54.0	2011	50.0	2012	62.8	2013	56.2	2014	55.0
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## RENEWAL BENCHMARK CONCLUSIONS

**Instructional Leadership.** Under the direction of the principal and with the support of a small group of instructional coaches, Eugenio maintains strong instructional leadership. Having been in place during the entire charter term, this team provides a coherent emphasis on delivering the educational program based on a highly focused, self-regulating approach to professional development. In embracing the Expeditionary Learning model of curriculum development and instruction, the school emphasizes both teacher and student responsibility for personal growth and learning.

- Eugenio’s leadership establishes an environment of high expectations for teacher performance in content knowledge and pedagogical skills in which teachers take responsibility for their own professional development and for collaborating with peers and the school leadership on school-wide planning for instructional improvement.
- The instructional leadership is adequate to support the development of the teaching staff. The principal and four subject-area coaches have held their positions since the last year of the previous charter term. The principal is the rating officer of the entire staff with the coaches acting as peer mentors to the teachers and as intermediaries between them and the principal.
- Under the auspices of the principal, the coaches provide sustained and systemic support to improve teachers’ instructional effectiveness. Within each subject area, the coaches have a caseload of teachers whom they observe and provide feedback and with whom they refine lesson plans. One afternoon in a six day cycle, the school schedule includes time for extended meetings between coaches and each of the respective teachers. The principal and coaches work with teachers to develop a specific student-centered goal (e.g., elaborating on answers that build on previous knowledge) for each coaching cycle.
- Instructional leaders provide many opportunities and guidance for teachers to plan curriculum and instruction within classrooms and at grade levels; they provide fewer opportunities across grade-levels. Staff devotes the first half-hour each day to classroom team planning. Coaches meet with the classroom teams occasionally on the six day cycle. At regular grade-level meetings, teachers examine classroom and end-of-unit assessments, as well as reviewing general curriculum plans. The 7<sup>th</sup> and 8<sup>th</sup> grade teachers (each responsible for one subject in both grades) meet every two weeks with an Expeditionary Learning consultant to develop disciplinary curricula (see below). There is more limited interaction between subject area teachers at different grade levels.
- Instructional leaders implement a comprehensive professional development program that develops teachers’ competencies and skills. Eugenio has a school-wide professional development meeting during each six-day cycle and half-days devoted to professional development three times each year. Teachers are fully aware of the current professional development priorities. Aside from focusing on instructional practices, much of the professional development relates to Expeditionary Learning curriculum development. Teachers regularly visit other Expeditionary Learning schools and attend national conferences.

## RENEWAL BENCHMARK CONCLUSIONS

- Professional development activities interrelate with classroom practice. Eugenio reinforces awareness of the current professional priorities through classroom observation rounds that focus on the existing professional development concerns. A selected group of teachers completes a structured observation protocol on their colleagues' instructional practice in one of the priority areas and then goes through a formal collaborative process with fellow observers on improvement strategies. Finally, based on the protocols, the principal generates a summary to stimulate further reflection.
- The principal regularly conducts teacher evaluations with clear criteria that accurately identify teachers' strengths and weaknesses. Using a pre- and post-observation discussion format, the principal evaluates teachers twice a year. He holds teachers accountable for quality instruction. He and the education corporation's board members use achievement data as additional evidence for supporting teachers who may need more intensive coaching support. Last year, one teacher who had been on an improvement plan resigned.

### NOTEWORTHY

In focusing on building its middle school program and implementing a Common Core framework, Eugenio is working with Expeditionary Learning to develop interdisciplinary, project-based learning. The principal, coaches and an Expeditionary Learning consultant collaborate with teachers to create school "expeditions." The 8<sup>th</sup> grade now has a project on food production and consumption with an integrated curriculum, in which students investigate: calorie calculations (in math), recipes (in Spanish), genetically modified organisms (in science), history of food co-ops (in social studies) and the best mode of food production (in ELA persuasive writing).

**Curriculum and Assessment.** Eugenio's curriculum supports teachers in their instructional planning. Eugenio also has an assessment system that improves instructional effectiveness and student learning.

- The school has a curriculum framework with student performance expectations that provides an underlying structure and aligns to state standards across grades. Eugenio uses curriculum modules from the state's online resource for implementing Common Core standards. These modules serve as the ELA framework for grades 3-8 and the mathematics framework for all grades. In grades K-2, the school uses the Core Knowledge curriculum in ELA. Eugenio uses the Scott Foresman curriculum in social studies and the Common Core standards themselves in science.

## RENEWAL BENCHMARK CONCLUSIONS

- The state’s online curriculum modules and the Common Core curriculum also provide scope and sequences, unit and lesson plans to support the ELA and mathematics programs. Teachers report that with the assistance of the content coaches, they regularly adapt the modules in response to student assessment data and in order to fit the school’s scheduling constraints.
- The school’s online curriculum materials and the commercial curricula help teachers know what to teach and when to teach it. The ELA and mathematics modules in particular detail specific lessons that align to the Common Core.
- Eugenio regularly administers assessments that align to the school’s curriculum. The school gives commercial web-based benchmark and reading-level assessments to track student growth throughout the year. The school administers mid- and end-of-unit module assessments in ELA and mathematics. Teachers also use daily exit tickets and weekly quizzes to monitor student performance.
- School leaders are aware of the importance of generating reliable scores on assessments. Although teachers grade assessments themselves, they discuss grading and student performance trends with coaches. The school conducts professional development writing-sample scoring sessions to review exemplar papers from each grade level. The coaches’ review of student writing samples helps to ensure vertical alignment across the grades.
- Coaches work with classroom teachers to plan lessons based on student performance. They jointly examine exit tickets and other assessment data during teacher prep times to adjust lesson plans, reorganize small student groups and decide on interventions for struggling students.
- Teachers grade assessments and discuss scores with their respective coaches. Besides these discussions of the delivery of instruction at the classroom level, the school relies on classroom teacher reports of quarterly report card grades to determine school-wide progress toward Accountability Plan goals. As coaches do not systematically monitor the grading process, the grades have limited reliability. While the school leadership regularly presents this information to the board of trustees at board meetings as the *EMHCS Accountability Plan Progress Report*, these classroom report card grades are not good predictors of Accountability Plan goal attainment.
- The school does not use student assessment data or test scores to evaluate teacher performance. However, classroom assessment results do help inform professional development topics and future adjustments to the overall academic program.
- Parents receive student report cards four times a year. They also receive progress reports regularly from teachers, although, as indicated above, each teacher decides on his/her own rating system.

**Pedagogy.** Teachers include elements of high quality instruction during the course of lesson activities.

# RENEWAL BENCHMARK CONCLUSIONS

## CLASSROOM OBSERVATION METHODOLOGY: NUMBER OF OBSERVATIONS

		GRADE								Total	
		K	1	2	3	4	5	6	7		8
CONTENT AREA	ELA		1	2	1		1	1	1		7
	Math		1	1	1	1	1			1	6
	ELA										
	Writing										
	Science										
	Soc Stu										
	Specials										
	Total		2	3	2	1	2	1	1	1	13

- Using the state’s curriculum modules, teachers deliver purposeful lessons. Each class has posted learning objectives that generally align with the curriculum. By reviewing vocabulary and concepts teachers build on students’ previous skill and knowledge. Classroom teachers and paraprofessionals as well as intervention teachers have clear roles in helping students reach lesson objectives. Besides generally monitoring student work, they work deliberately with small groups in classroom learning centers.
- Teachers regularly use techniques to check for student understanding. They use recall questions to gauge understanding when advancing lesson activities. Teachers monitor student responses and written work during the course of a lesson and evaluate student performance with exit tickets at the end of the lesson.
- Teachers include opportunities in their lessons to challenge students with questions and activities that develop depth of understanding and higher-order thinking and problem solving skills. Most teachers include opportunities in their lessons to challenge students with higher-order questions. The curriculum modules provide activities that develop depth of understanding and problem solving skills. Teachers generally challenge students to defend and elaborate on their answers. Through center activities, students actively interact with peers in engaging learning activities. The middle school is beginning to implement Expeditionary Learning with investigative projects that encourage developing new knowledge and skills to investigate open-ended problems.
- Teachers establish and maintain a classroom environment with a consistent focus on academic achievement. Throughout the school, students are generally on-task and engaged in learning. Teachers are prepared with materials readily available, which minimizes transition time. Teachers use effective techniques to focus on students’

# RENEWAL BENCHMARK CONCLUSIONS

attention on lesson activities. Teachers clearly communicate behavioral expectations and redirect misbehavior.

**At-Risk Students.** Eugenio invests extensive resources to implement effective intervention programs that address the educational needs of at-risk students.

- Over the course of the charter term, Eugenio has used a tiered-intervention strategy, providing adequate programs to address the needs of struggling students. The first tier serves all general education students in their classrooms, with the second tier providing an additional 90 minutes of intensive ELA instruction every other day, helping to fill literacy gaps amongst this subgroup of students. For the 13 students with individualized education programs (“IEPs”), classroom teachers and specialists with special education certification provide push-in, small group support. The school also offers pull-out services for students that are particularly high need. The school’s 32 ELLs attend half blocks of Spanish Language Arts (“SLA”) when in grades K-4, and full day SLA blocks in grades 5-8. When not teaching SLA classes, SLA teachers push-in to general education classrooms to support ELLs in understanding classroom content, which they reported as effective. Students at-risk of academic failure also benefit from Eugenio’s morning and afternoon tutoring periods, which focus on specific areas such as vocabulary support.
- Eugenio continues to have clear processes for identifying at-risk students. The school reviews assessment data and classroom work to decide if a student needs extra interventions. If interventions prove to be ineffective, Eugenio’s student support team refers students for evaluation for special education services. Eugenio identifies ELLs through the administration of the New York State Identification Test for English Language Learners.
- Eugenio employs a special education coordinator that oversees the special education program. General classroom teachers, in addition to teacher specialists and paraprofessionals, work together to implement the school’s intervention programs. The Spanish literacy coach supervises SLA teachers in their push-in support of ELLs and in instructional planning for SLA classes.
- The Eugenio staff effectively monitors the progress of struggling general education students through use of web-based benchmark and reading-level assessments that track students’ progress at least bi-weekly allowing different stake-holders the ability to understand where each student is performing at any given time. Specialists use classroom work and assessments to gauge the progress of students with IEPs and SLA teachers use data from their own assessments to determine the progress of ELLs.
- Teachers continue to receive adequate support in serving the needs of students who are at-risk of academic failure. The school’s professional development schedule allows opportunities for the special education coordinator and subject area coaches to provide instructional techniques for interventions. Particularly for the service of ELLs, the Spanish literacy coach and subject area coaches provide teachers with the most effective ways to

# RENEWAL BENCHMARK CONCLUSIONS

help meet ELL needs. Teachers report these supports as useful in helping them ensure all students have the tools necessary for academic success.

	2011-12	2012-13	2013-14
<b>Enrollment (N) Receiving Mandated Academic Services</b>	(21)	(21)	(24)
<b>RESULTS</b>			
Tested on State Exams (N)	(7)	(4)	(6)
Percent Proficient on ELA Exam	0.0	0	0
Percent Proficient Statewide	15.2	5.0	5.2

	2011-12	2012-13	2013-14
<b>ELL Enrollment (N)</b>	(15)	(34)	(36)
<b>RESULTS</b>			
Tested on NYSESLAT <sup>9</sup> Exam (N)	(N/A)	(0)	(26)
Percent 'Proficient' or Making Progress <sup>10</sup> on NYSESLAT	N/A	N/A	26.9

<sup>9</sup> New York State English as a Second Language Achievement Test, a standardized state exam.

<sup>10</sup> Defined as moving up at least one level of proficiency. Student scores fall into four categories/proficiency levels: Beginning; Intermediate; Advanced; and, Proficient.

# RENEWAL BENCHMARK CONCLUSIONS

## IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

Eugenio is an effective and viable organization. The education corporation board (the “board”) carries out its oversight responsibilities with an unrelenting focus on student achievement. The school organization effectively supports the delivery of the educational program. During the current charter term, the board has generally abided by its by-laws and been in general and substantial compliance with the terms of its charter, code of ethics, applicable state and federal law, rules and regulations.

## ORGANIZATIONAL STRUCTURE

**Board Oversight.** The education corporation board works effectively to achieve the school’s Accountability Plan goals.

- A 15 member board, with three seats reserved for parent representatives, continues to govern the school. The board is stable with many founding members still serving. Board members bring experience in non-profit services, youth organizations, government agencies, finance, higher education and K-12 school administration, to the board’s governance of Eugenio. The board chairperson provides all new board members with a board manual and an orientation session on the school’s vision, mission, by-laws and code of ethics. The board currently seeks members with legal and data analysis expertise.
- The board’s committees -- including executive, nominating, by-laws, finance, academic, and personnel – provide the necessary structure and procedures to govern the school and oversee management of day-to-day operations. The academic committee and full board identify ways to improve the program through an action plan that they monitor through the principal’s monthly data dashboard.
- Eugenio’s board carefully focuses on its Accountability Plan goals and state test results by examining percentage passing at each grade level along with percentages at each Performance Level. It reviews the principal’s plans for addressing areas of concern. The board has raised valid concerns about the school’s 2012-13 results.
- Board members indicate that the ongoing assessments administered throughout the year give them an accurate sense of student performance and that the results are strong. However, as discussed above in the *Curriculum and Assessment* section, the board relies on the principal’s quarterly reports of student proficiency based each teachers’ independent grading.
- Eugenio’s board regularly evaluates the school leader’s performance. The personnel committee evaluates the principal, focusing on the implementation of the Common Core standards and on student achievement. The board develops action plans to address areas in which the principal has not performed to its expectations.

# RENEWAL BENCHMARK CONCLUSIONS

**Organizational Capacity.** Eugenio’s education corporation effectively supports the delivery of the education program. The education corporation has established a well-functioning organizational structure with staff, systems, and procedures that allow the school to carry out its academic program as set forth in its charter agreement.

- The principal has administrative responsibility over the school’s operations, overseeing a bookkeeper, data coordinator, facilities staff, athletic director and kitchen staff. He also oversees the school’s budget and human resource functions. He supervises the coaches who carry out day-to-day responsibilities for implementing the instructional program.
- With strict adherence to its dual language program and operating at two facilities (grades K-3 and grades 4-8) at some distance apart, the school has a complex organization. The school is rolling out throughout the school, content instruction (i.e., mathematics, science and social studies) in Spanish and English on alternating days. Each grade has both ELA and content area teachers. At each site, the school has an education coordinator who serves as the site administrator.
- The organizational structure establishes distinct lines of accountability with clearly defined roles and responsibilities. The principal and coaches benefit from having worked together for five years. The coaches provide consistent ongoing peer mentoring support for their respective subject area teachers. Teachers understand the separate roles of the principal and coaches.
- The school continues to have a clear student discipline system that it applies consistently. Through Expeditionary Learning’s emphasis on peer support and a focus on teacher - student rapport and mutual trust, classroom management is now effective throughout the school including the middle school grades.
- Eugenio continues to allocate sufficient resources to support its mission and the achievement of goals including full-time classroom paraprofessionals in the lower grades, an extended day program and extensive support for implementing the Expeditionary Learning model.
- The school retains quality staff with generally little turnover. It has had some teacher turnover in the middle school grades attributable to the ongoing development of the 7<sup>th</sup> and 8<sup>th</sup> grade program, which the school has only operated for the last two years. After monitoring and evaluating the middle school program, the school now bases its middle school hiring on finding teachers who are likely to build relationships with students and to embrace the school’s instructional model.
- Eugenio maintains adequate student enrollment with a waiting list in each grade.

# RENEWAL BENCHMARK CONCLUSIONS

## FAITHFULNESS TO CHARTER & PARENT SATISFACTION

As part of their initial applications and their Applications for Charter Renewal, schools identify the Key Design Elements that reflect their missions and distinguish the schools. The table below reflects the intended Key Design Elements and indicates for each if the school is implementing the element as included in the school’s charter.

Key Design Elements	Evident?
Engaging curriculum linked to real world experiences;	+
Safety nets;	+
Personal attention to all students;	+
Skilled teachers;	+
Strong leaders;	+
Safe environment;	+
Family/community involvement;	+
User-friendly data; and,	+
Graduation requirements.	+

**Parent Satisfaction.** The school submitted survey results with its Application for Charter Renewal. Although the survey response rate is low, respondents indicate general satisfaction with the school. The school’s increasing data on persistence provided below also indicates parent satisfaction with the program.

2013-14
Response Rate: 36%
Overall satisfaction: 87%
Academics: 81%
Communication: 70%

**Persistence in Enrollment.** The Institute derived the following statistical information from its database. No comparative data from the New York State Education Department (“NYSED”) is available to the Institute to provide a district-wide comparison. As such, the data presented is for information purposes but does not allow for comparative analysis.

# RENEWAL BENCHMARK CONCLUSIONS

	2011-12	2012-13	2013-14
Percent of Eligible Students Returning From Previous Year	84.5	94.3	94.7

## COMPLIANCE

**Governance.** In material respects, the Eugenio board has implemented and abided by adequate and appropriate systems, processes, policies and procedures to ensure the effective governance and oversight of the school. The board demonstrates a thorough understanding of its role in holding the school leadership accountable for both academic results and fiscal soundness.

- The board of trustees has generally managed governance conflicts of interest, especially those with the Ibero-American Action League, in a clear and transparent manner through recusal. Note the exception in the Internal Controls section, below, related to contract conflicts.
- Except as noted in the Internal Controls section, below, the board has materially complied with the terms of its by-laws and code of ethics.
- After several deficiencies were identified in an audit conducted by the New York State Comptroller (see Internal Controls section, below), the board created a finance committee, which meets monthly, to stay abreast of all financial matters of the school.
- The board hired appropriate, separate independent auditors for monthly reports and annual audit.

**Legal Requirements.** The education corporation generally and substantially complies with applicable state and federal laws, rules and regulations and the provisions of its charter.

- The Institute has received no formal complaints regarding the school and few informal complaints.

The Institute noted exceptions to the school's compliance in the following areas.

- **By-laws.** Certain committee provisions of the education corporation's by-laws need to be updated in order to be in compliance with the New York Not-For-Profit Corporation Law. As with all other compliance related adjustments identified here, the Institute will require the school to update the document prior to the commencement of a new charter term.
- **Code of Ethics.** While the education corporation supplied a code of ethics that was updated to comply with New York General Municipal Law, the code still needs to contain provisions to prohibit trustees from having any interest in a for-profit contract with the school, and to disclose any interest in a not-for-profit contract with the education corporation whether or not it comes before the board with such contracts to be at fair

## RENEWAL BENCHMARK CONCLUSIONS

market value. The Institute will work with the board to update the code of ethics to ensure it contains these provisions.

# RENEWAL BENCHMARK CONCLUSIONS

## IS THE EDUCATION CORPORATION FISCALLY SOUND?

Based on evidence collected in the renewal review, Eugenio is fiscally sound. The education corporation has successfully managed cash flow and has adequate financial resources to ensure stable operations. The education corporation engages in effective budgeting practices and routinely conducts monitoring of revenues and expenses, making appropriate adjustments when necessary. The SUNY Fiscal Dashboard, a multi-year financial data and analysis for SUNY authorized charter schools appears below in the Appendix.

**Budgeting and Long-Range Planning.** Throughout the charter term, Eugenio has maintained fiscal soundness by implementing effective budgeting practices and routine monitoring of revenues and expenses. Net assets have remained consistent over the charter term.

- The education corporation's development of annual budgets includes input and analysis from the principal and accounting staff with appropriate input, and evaluation from the board's finance committee. Budget variances are routinely analyzed by the accounting staff and material variances are discussed with the principal and board finance committee.
- The education corporation also develops and maintains a five year projected budget that is updated every year based on actual and forecasted enrollment, staffing, revenues and expenditures.
- The accounting staff and principal currently prepare bi-monthly financial reports that include a current balance sheet and budget to actual comparison of revenues and expenses. The board's finance committee subsequently reviews and analyzes with the school leaders prior to presentation to, and consideration by, the full board. For the 2014-15 school year, the education corporation has enlisted help from an independent certified public accountant to provide additional ongoing fiscal oversight. The board finance committee will also begin meeting monthly rather than bi-monthly.
- Since the last renewal in 2009, SUNY charter agreements now include a requirement regarding the potential closure and/or dissolution of a school. The education corporation must create a dissolution reserve fund for purposes of school closure and/or dissolution by setting aside seventy-five thousand dollars (\$75,000) to be funded, at a minimum, by reserving twenty-five thousand dollars (\$25,000) per year during the first three years of the charter term. The fund must be held separately and identified in financial statements as a separate reserve.

**Internal Controls.** The education corporation has established and maintains a very basic set of fiscal policies, procedures and controls. The Institute recommended that the education corporation further develop a financial policy and procedures manual to strengthen internal controls around all key issues including cash management, cash receipts, cash disbursements, credit card usage, bank reconciliations, financial reporting, revenues, procurement, expenditures, payroll, banking, capital assets, travel expenses, grant reporting and record retention and

# RENEWAL BENCHMARK CONCLUSIONS

interfacing with the school's independent external auditor. The education corporation has begun making improvements to the Financial Policy and Procedures Manual.

- The independent audits have found that the education corporation has accurately recorded and appropriately documented transactions in accordance with established policies.
- The education corporation's most recent audit reports of internal controls related to financial reporting and compliance with laws, regulations and grants, disclosed no material weaknesses, or instances of non-compliance. The Institute became concerned about the lack of audit findings when the school was audited by the New York State Comptroller and findings were reported.
- In January 2014, New York State Comptroller issued an audit report on Procurements and Information Technology (2013M-136). The audit found that the building leases and 12 service contracts were not competitively sought. While applicable law does not mandate competitive bidding in all cases, some of the leases and contracts raised concerns that contractors had business or occupational relationships with members of the board or their family or friends. The board acknowledged to the Institute how the best interest of the school could appear to be questionable based on these findings.
- The education corporation responded to the audit findings and has since began documenting processes for contracting service contracts to make certain contracts are at fair market value and any conflicts disclosed.
- In addition, the lease for facilities with the Ibero-American Development Corporation (affiliated with the Ibero-American Action League, Inc.) is due to expire August 2015. As at least one member of the board is affiliated with those entities, the board will require conflict-free re-negotiations and a fair market value analysis of the lease value prior to renewing the lease.

**Financial Reporting.** The education corporation has complied with financial reporting requirements by providing the SUNY Trustees and NYSED with required financial reports.

- The education corporation presents its annual financial statements in accordance with generally accepted accounting principles (GAAP) and the independent audits of those statements have received unqualified opinions.
- The education corporation has generally filed key reports timely and accurately including: audit reports, budgets, cash-flow statements, un-audited reports of revenues, expenses and enrollment, and grant expenditure reports.

**Financial Condition.** The education corporation maintains adequate financial resources to ensure stable operations.

## RENEWAL BENCHMARK CONCLUSIONS

- The education corporation has posted fiscally strong composite-score ratings for the first four years of the charter term and dropped to fiscally adequate in the most recent fiscal year on the SUNY Fiscal Dashboard indicating a consistent level of fiscal stability over the charter contract term.<sup>11</sup>
- In 2012, the education corporation entered into a purchase agreement for one of the school's locations at 1075-1089 Joseph Avenue, Rochester. The education corporation signed a ten-year mortgage note for \$630,000 with M&T Bank with a balloon payment due April 2023. The facility is suitable and funded through general operating revenues.
- The education corporation maintains adequate cash flow and on average 1.5 months of cash reserves to cover current bills and those coming due shortly. The most recent fiscal year ended with 21 days of cash on hand. The recommended cash reserve would be a one month reserve therefore the SUNY Fiscal Dashboard reflects a medium overall risk in this category. In addition, the education corporation maintains investment accounts consisting of money market funds that are beneficial but not considered cash accounts for cash reserve purposes. The investments are reflected as other assets in financial reports.
- The education corporation maintains its operations from the district per pupil revenues without depending on contributions or fundraising.

The SUNY Fiscal Dashboard, provided in the Appendix, presents color coded tables and charts indicating that Eugenio has demonstrated fiscal soundness over the course of its charter term.<sup>12</sup>

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<sup>11</sup> The composite score assists in measuring the financial health of an education corporation using a blended score that measures the school's performances on key financial indicators. The blended score offsets financial strengths against areas where there may be financial weaknesses.

<sup>12</sup> The U.S. Department of Education has established fiscal criteria for certain ratios or information with high – medium – low categories, represented in the table as green – gray – red. The categories generally correspond to levels of fiscal risk, but must be viewed in the context of each education corporation and the general type or category of school.

# RENEWAL BENCHMARK CONCLUSIONS

## IF THE SUNY TRUSTEES RENEW THE EDUCATION CORPORATION'S AUTHORITY TO OPERATE THE SCHOOL, ARE ITS PLANS FOR THE SCHOOL REASONABLE, FEASIBLE AND ACHIEVABLE?

To the extent that Eugenio has met or come close to meeting its academic Accountability Plan goals, has in place a sound educational program that supports achieving those goals, operates as an effective and viable organization and is fiscally sound, the plans to implement the educational program as proposed during the next charter term are reasonable, feasible and achievable.

**Plans for the School's Structure.** The education corporation has provided all of the key structural elements for a charter renewal and those elements are reasonable, feasible and achievable.

## MISSION FOR THE NEXT CHARTER TERM

The mission of Eugenio Maria De Hostos Charter School is to create a safe and nurturing community of learners where students earn the Seal of Biliteracy (English and Spanish), learn to advocate for social justice and are prepared to enjoy and access what the world has to offer.

### Plans for the Educational Program.

	Current Charter Term	End of Next Charter Term
Enrollment	400	936
Grade Span	K-8	K-12
Teaching Staff	30 (Grades K-8)	60.5 (Grades K-12)
Days of Instruction	187	187

Eugenio plans to add high school grades beginning with the 2016-17 school year and would continue to implement the Expeditionary Learning program model as it does currently in grades 7 and 8. In addition to adding 9<sup>th</sup>-12<sup>th</sup> grades, the school plans to increase enrollment in elementary grades by adding two additional sections at each grade level beginning with K and 1<sup>st</sup> grade in 2016-17. The school would serve four sections of students rather than its current two in Kindergarten through 4<sup>th</sup> grade at the end of the next charter term.

## RENEWAL BENCHMARK CONCLUSIONS

**Plans for Board Oversight and Governance.** Board members express an interest in continuing to serve Eugenio in the next charter term and may add additional members in the future.

**Fiscal & Facility Plans.** Based on evidence collected through the renewal review, including a review of the 5-year financial plan, Eugenio presents a reasonable and appropriate fiscal plan for the next charter term including budgets that are feasible and achievable. The organization's track record of fiscal soundness and the financial projection submitted and reviewed sufficiently demonstrate that Eugenio has the ability to operate in a fiscally sound manner during the next charter term.

The school plans to continue to provide instruction in its current locations while it expands the Joseph Avenue campus to accommodate Kindergarten through 6<sup>th</sup> grade students. Eugenio anticipates leasing additional space beginning with the 2018-19 school year, when it will provide instruction in Kindergarten through 11<sup>th</sup> grade.

The school's Application for Charter Renewal contains all necessary elements as required by the Act. The proposed school calendar allots an appropriate amount of instructional time to meet or exceed instructional time requirements, and taken together with other academic and key design elements, should be sufficient to allow the school to meet its proposed Accountability Plan goals. The school has amended or will amend other key aspects of the renewal application including by-laws, code of ethics and contracting procedures to comply with various provisions of federal regulations, and the New York Education Law, Not-for-Profit Corporation Law, Public Officers Law or General Municipal Law, as appropriate. Based on the foregoing, the school, as described in the amended Application for Charter Renewal will meet the requirements of the Act and all other applicable laws, rules and regulations.

# APPENDIX: SCHOOL OVERVIEW

## Mission Statement

The mission of Eugenio Maria De Hostos Charter School is to create a safe and nurturing community of learners where students earn the Seal of Biliteracy (English and Spanish), learn to advocate for social justice and are prepared to enjoy and access what the world has to offer.

## Board of Trustees<sup>13</sup>

Board Member Name	Position
Julio Vazquez	President
Gaynelle Wethers	Trustee
George Romell	Trustee
Margaret Quackenbush	Vice Chair
Miriam Vazquez	Trustee
Raymond Ciccarelli	Trustee
Hilda Escher	Secretary
Fernan Cepero	Trustee
Eugenio Marlin	Trustee
Brian Roulin	Treasurer
Marcia DeJesus-Rueff	Trustee
Nancy Ares	Trustee

## School Characteristics

School Year	Proposed Enrollment	Actual Enrollment <sup>14</sup>	Proposed Grades	Actual Grades
2010-11	360	350	K-7	K-7
2011-12	400	385	K-8	K-8
2012-13	400	393	K-8	K-8
2013-14	400	397	K-8	K-8
2014-15	400	407	K-8	K-8

<sup>13</sup> Source: Institute board records at the time of the renewal review.

<sup>14</sup> Source: The Institute's Official Enrollment Binder. (Figures may differ slightly from New York State Report Cards, depending on date of data collection.)

# APPENDIX: SCHOOL OVERVIEW

## Student Demographics

	2011-12		2012-13		2013-14 <sup>15</sup>
	% of School Enrollment	% of Rochester CSD Enrollment	% of School Enrollment	% of Rochester CSD Enrollment	% of School Enrollment
<b>Race/Ethnicity</b>					
American Indian or Alaska Native	0	0	0	0	0
Black or African American	38	62	34	61	32
Hispanic	58	24	61	25	63
Asian, Native Hawaiian, or Pacific Islander	0	3	0	3	0
White	1	10	4	10	3
Multiracial	3	0	1	0	2
<b>Special Populations</b>					
Students with Disabilities	5	18	5	18	6
English Language Learners	4	11	8	11	9
<b>Free/Reduced Lunch</b>					
Eligible for Free Lunch	65	83	73	80	--
Eligible for Reduced-Price Lunch	8	5	9	3	--
Economically Disadvantaged	89	90	89	85	75

## School Leaders

School Year(s)	Name(s) and Title(s)
2000-01 to 2008-2009	Miriam Vazquez, Principal
2009-10 to Present	Jeff Halsdorfer, Principal

<sup>15</sup> The Institute derived the 2013-14 Students with Disabilities, ELL and Economically Disadvantaged statistics from the school's October 2013 student enrollment report to NYSED (2013-14 BEDS Report). District data are not yet available. Because NYSED releases data up to a full year after the conclusion of any one school year, the data presented in this table may differ from current information reported by the school and included in this report.

# APPENDIX: SCHOOL OVERVIEW

## School Visit History

School Year	Visit Type	Evaluator (Institute/External)	Date
<b>2009-10</b>	Subsequent Renewal Visit	Institute	November 12, 2009
<b>2011-12</b>	Evaluation Visit	Institute	October 13, 2011
<b>2013-14</b>	Subsequent Renewal Visit	Institute	May 13, 2014

## Conduct of the Renewal Visit

Date(s) of Visit	Evaluation Team Members	Title
<b>May 13-14, 2014</b>	Ron Miller, PhD	Executive Deputy Director for Accountability
	Aaron Campbell	Senior Analyst

# APPENDIX: FISCAL DASHBOARD



**Charter Schools Institute**  
The State University of New York

## Eugenio Maria de Hostos Charter School

### SCHOOL INFORMATION

#### FINANCIAL POSITION

##### Assets

##### Current Assets

Cash and Cash Equivalents - **GRAPH 1**  
Grants and Contracts Receivable  
Accounts Receivable  
Prepaid Expenses  
Contributions and Other Receivables

##### Total Current Assets - **GRAPH 1**

Property, Building and Equipment, net

Other Assets

##### Total Assets - **GRAPH 1**

##### Liabilities and Net Assets

##### Current Liabilities

Accounts Payable and Accrued Expenses  
Accrued Payroll and Benefits  
Deferred Revenue  
Current Maturities of Long-Term Debt  
Short Term Debt - Bonds, Notes Payable  
Other

##### Total Current Liabilities - **GRAPH 1**

L-T Debt and Notes Payable, net current maturities

##### Total Liabilities - **GRAPH 1**

##### Net Assets

Unrestricted  
Temporarily restricted

##### Total Net Assets

##### Total Liabilities and Net Assets

#### ACTIVITIES

##### Operating Revenue

Resident Student Enrollment  
Students with Disabilities

##### Grants and Contracts

State and local  
Federal - Title and IDEA  
Federal - Other  
Other  
Food Service/Child Nutrition Program

##### Total Operating Revenue

##### Expenses

Regular Education  
SPED  
Regular Education & SPED (combined)  
Other

##### Total Program Services

Management and General  
Fundraising

##### Total Expenses - **GRAPHS 2, 3 & 4**

##### Surplus / (Deficit) From School Operations

##### Support and Other Revenue

Contributions  
Fundraising  
Miscellaneous income  
Net assets released from restriction

##### Total Support and Other Revenue

Total Unrestricted Revenue

Total Temporarily Restricted Revenue

##### Total Revenue - **GRAPHS 2 & 3**

##### Change in Net Assets

##### Net Assets - Beginning of Year - **GRAPH 2**

Prior Year Adjustment(s)

##### Net Assets - End of Year - **GRAPH 2**

Opened 2000-01					
	2009-10	2010-11	2011-12	2012-13	2013-14
<b>Total Current Assets - GRAPH 1</b>	1,235,013	942,270	763,177	642,734	534,769
<b>Total Assets - GRAPH 1</b>	1,240,078	1,521,191	2,274,528	2,244,733	2,070,838
<b>Total Current Liabilities - GRAPH 1</b>	303,082	293,682	394,405	380,213	561,058
<b>Total Liabilities - GRAPH 1</b>	303,082	293,682	1,001,430	968,042	1,128,620
<b>Total Net Assets</b>	936,996	1,227,509	1,273,098	1,276,691	942,218
<b>Total Liabilities and Net Assets</b>	1,240,078	1,521,191	2,274,528	2,244,733	2,070,838
<b>Total Operating Revenue</b>	4,201,448	4,867,476	5,322,273	5,470,675	5,480,976
<b>Total Expenses - GRAPHS 2, 3 &amp; 4</b>	4,420,809	4,576,963	5,276,684	5,467,082	5,815,449
<b>Surplus / (Deficit) From School Operations</b>	(219,361)	290,513	45,589	3,593	(334,473)
<b>Total Support and Other Revenue</b>	5,792	-	-	-	-
<b>Total Revenue - GRAPHS 2 &amp; 3</b>	4,207,240	4,867,476	5,322,273	5,470,675	5,480,976
<b>Net Assets - Beginning of Year - GRAPH 2</b>	1,150,565	936,996	1,227,509	1,273,098	1,276,691
<b>Net Assets - End of Year - GRAPH 2</b>	936,996	1,227,509	1,273,098	1,276,691	942,218

# APPENDIX: FISCAL DASHBOARD



## Eugenio Maria de Hostos Charter School

### SCHOOL INFORMATION - (Continued)

#### Functional Expense Breakdown

	2009-10	2010-11	2011-12	2012-13	2013-14
Personnel Service	315,057	265,382	275,440	288,360	299,579
Administrative Staff Personnel	1,641,960	1,851,182	2,138,046	2,201,201	2,312,025
Instructional Personnel	184,451	17,400	12,945	14,341	12,634
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	2,141,469	2,133,964	2,426,431	2,503,902	2,624,238
Total Salaries and Staff	690,369	531,113	671,330	721,963	796,748
Fringe Benefits & Payroll Taxes	-	157,622	200,721	235,461	328,626
Retirement	-	-	-	-	-
Management Company Fees	365,001	366,000	346,456	290,244	290,244
Building and Land Rent / Lease	15,004	42,148	57,968	35,775	33,737
Staff Development	414,201	238,370	265,469	307,288	324,224
Professional Fees, Consultant & Purchased Services	-	835	275	1,271	1,386
Marketing / Recruitment	239,092	520,295	676,377	610,787	614,510
Student Supplies, Materials & Services	194,114	3,329	23,725	38,730	48,219
Depreciation	361,560	583,287	607,932	721,661	753,517
Other	4,420,810	4,576,963	5,276,684	5,467,082	5,815,449
<b>Total Expenses</b>					

### SCHOOL ANALYSIS

#### ENROLLMENT

	2009-10	2010-11	2011-12	2012-13	2013-14
Chartered Enroll	280	360	400	400	400
Revised Enroll	320	-	-	-	-
Actual Enroll - GRAPH 4	326	350	386	393	397
Chartered Grades	K-6	K-7	K-8	K-8	K-8
Revised Grades	-	-	-	-	-

#### Primary School District: Rochester

Per Pupil Funding (Weighted Avg of All Districts)	2009-10	2010-11	2011-12	2012-13	2013-14
	10,868	12,426	12,426	12,426	12,005
Increase over prior year	0.0%	14.3%	0.0%	0.0%	-3.4%

#### PER STUDENT BREAKDOWN

##### Revenue

	2009-10	2010-11	2011-12	2012-13	2013-14	Average - 5 Yrs. OR Charter Term
Operating	12,888	13,907	13,788	13,920	13,806	13,662
Other Revenue and Support	18	-	-	-	-	4
<b>TOTAL - GRAPH 3</b>	<b>12,906</b>	<b>13,907</b>	<b>13,788</b>	<b>13,920</b>	<b>13,806</b>	<b>13,665</b>

##### Expenses

Program Services	12,208	11,654	12,336	12,493	13,139	12,366
Management and General, Fundraising	1,352	1,423	1,334	1,418	1,510	1,408
<b>TOTAL - GRAPH 3</b>	<b>13,561</b>	<b>13,077</b>	<b>13,670</b>	<b>13,911</b>	<b>14,648</b>	<b>13,774</b>
% of Program Services	90.0%	89.1%	90.2%	89.8%	89.7%	89.8%
% of Management and Other	10.0%	10.9%	9.8%	10.2%	10.3%	10.2%
% of Revenue Exceeding Expenses - GRAPH 5	-4.8%	6.3%	0.9%	0.1%	-5.8%	-0.8%

#### Student to Faculty Ratio

2009-10	2010-11	2011-12	2012-13	2013-14
7.1	6.3	6.9	4.2	4.3

#### Faculty to Admin Ratio

2009-10	2010-11	2011-12	2012-13	2013-14
5.8	4.7	4.7	7.8	7.8

#### Financial Responsibility Composite Scores - GRAPH 6

Score	2009-10	2010-11	2011-12	2012-13	2013-14	Average
Score	2.0	2.8	2.2	2.1	1.4	2.1
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Adequate	Fiscally Strong

#### Working Capital - GRAPH 7

Net Working Capital	931,931	648,588	368,772	262,521	(26,289)	437,105
As % of Unrestricted Revenue	22.2%	13.3%	6.9%	4.8%	-0.5%	9.3%
Working Capital (Current) Ratio Score	4.1	3.2	1.9	1.7	1.0	2.4
Risk (Low > 3.0 / Medium 1.4 - 2.9 / High < 1.4)	LOW	LOW	MEDIUM	MEDIUM	HIGH	MEDIUM
Rating (Excellent > 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	Excellent	Excellent	Good	Good	Poor	Good

#### Quick (Acid Test) Ratio

Score	4.0	2.9	1.9	1.7	1.0	2.3
Risk (Low > 2.5 / Medium 1.0 - 2.4 / High < 1.0)	LOW	LOW	MEDIUM	MEDIUM	MEDIUM	MEDIUM
Rating (Excellent > 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	Excellent	Excellent	Good	Good	Good	Good

#### Debt to Asset Ratio - GRAPH 7

Score	0.2	0.2	0.4	0.4	0.5	0.4
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	LOW	LOW	LOW	LOW	MEDIUM	LOW
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	Excellent	Excellent	Excellent	Excellent	Good	Excellent

#### Months of Cash - GRAPH 8

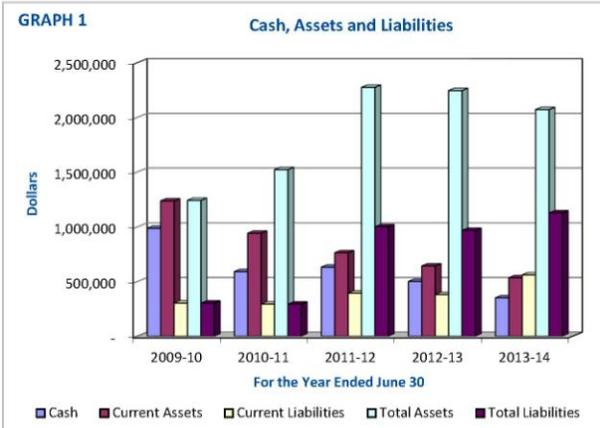
Score	2.7	1.5	1.4	1.1	0.7	1.5
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	MEDIUM	MEDIUM	MEDIUM	MEDIUM	HIGH	MEDIUM
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	Good	Good	Good	Good	Poor	Good

# APPENDIX: FISCAL DASHBOARD

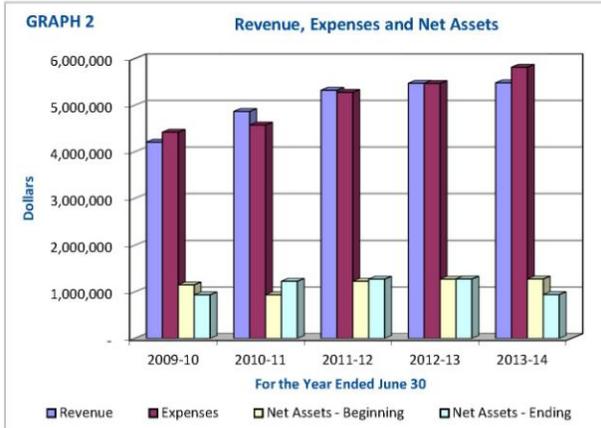


Charter Schools Institute  
The State University of New York

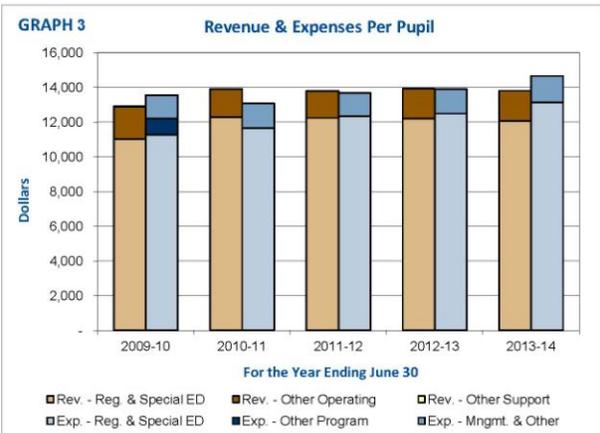
## Eugenio Maria de Hostos Charter School



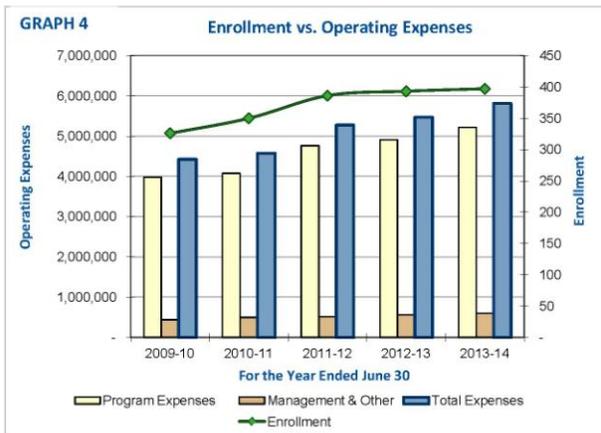
This chart illustrates total revenue and expenses each year and the relationship those subsets have on the increase/decrease of net assets on a year-to-year basis. Ideally subset 1, revenue, will be taller than subset 2, expenses, and as a result subset 3, net assets - beginning, will increase each year building a more fiscally viable school.



This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 thru 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally speaking, the bigger that gap, the better.



This chart illustrates the breakdown of revenue and expenses on a per pupil basis. Caution should be exercised in making school-by-school comparisons since schools serving different missions or student populations are likely to have substantially different educational cost bases. Comparisons with similar schools with similar dynamics are most valid.



This chart illustrates to what extent the school's operating expenses have followed its student enrollment pattern. A baseline assumption that this data tests is that operating expenses increase with each additional student served. This chart also compares and contrasts growth trends of both, giving insight into what a reasonable expectation might be in terms of economies of scale.

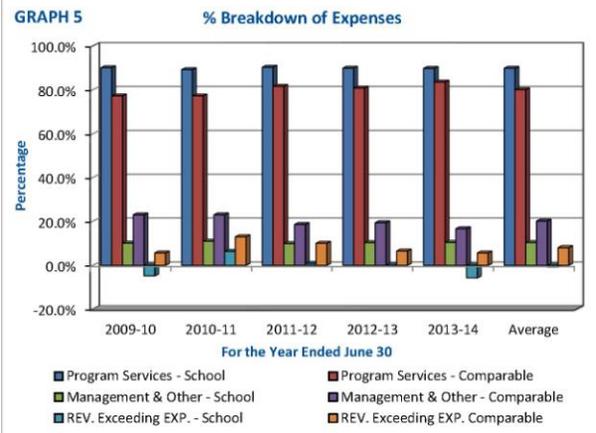
# APPENDIX: FISCAL DASHBOARD



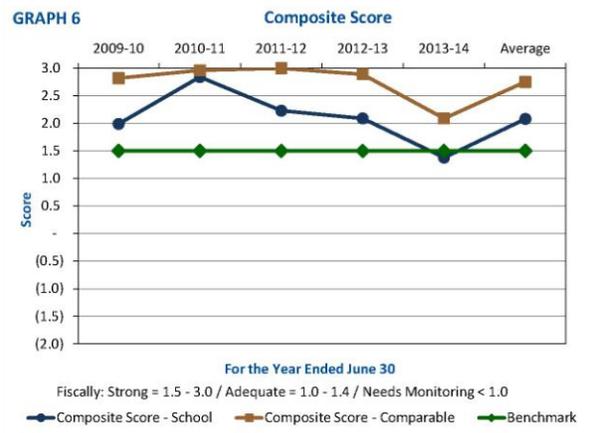
## Eugenio Maria de Hostos Charter School

Comparable School, Region or Network: Western & Central NY Schools

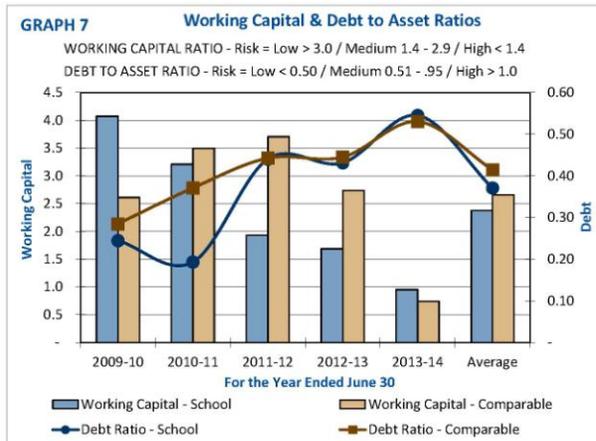
\* Average = Average - 5 Yrs. OR Charter Term



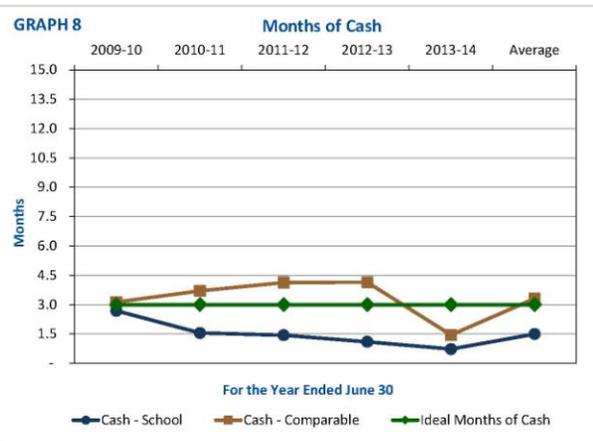
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding expenses should not be negative. Similar caution, as mentioned on GRAPH 3, should be used in comparing schools.



This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid for observing the fiscal trends of a particular school and used as a tool to compare the results of different schools.



This chart illustrates Working Capital and Debt to Asset Ratios. W/C indicates if a school has enough short-term assets to cover its immediate liabilities/short term debt. Debt to Asset indicates what proportion of debt a school has relative to its assets. The measure gives an idea to the leverage of the school along with the potential risks the school faces in terms of its debt-load.



This chart illustrates how many months of cash the school has in reserves. This metric is to measure solvency – the school's ability to pay debts and claims as they come due. This gives some idea of how long a school could continue its ongoing operating costs without tapping into some other, non-cash form of financing in the event that revenues were to cease flowing to the school.

# APPENDIX: PERFORMANCE SUMMARIES

## SCHOOL PERFORMANCE SUMMARY: English Language Arts Eugenio Maria De Hostos Charter School



	2011-12 Grades Served: K-8			MET	2012-13 Grades Served: K-8			MET	2013-14 Grades Served: K-8			MET			
	Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)				
<b>ABSOLUTE MEASURES</b> 1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.	3	55.1 (49)	57.1 (42)	NO	3	31.4 (51)	30.0 (50)	NA	3	24.0 (50)	26.7 (45)	NA			
	4	59.1 (44)	57.1 (42)		4	24.4 (41)	29.4 (34)		4	12.8 (47)	13.3 (45)				
	5	34.1 (41)	35.3 (34)		5	6.8 (44)	7.0 (43)		5	14.3 (42)	16.2 (37)				
	6	74.4 (39)	69.7 (33)		6	18.4 (38)	18.2 (33)		6	23.8 (42)	22.2 (36)				
	7	54.3 (35)	59.4 (32)		7	20.6 (34)	30.4 (23)		7	3.0 (33)	4.3 (23)				
	8	38.5 (26)	36.4 (22)		8	20.0 (30)	19.2 (26)		8	30.8 (26)	33.3 (24)				
	All	53.4 (234)	53.7 (205)		All	20.6 (238)	22.0 (209)		All	17.9 (240)	19.5 (210)				
2. Each year the school's aggregate Performance Level Index on the State exam will meet the Annual Measurable Objective set forth in the State's NCLB accountability system.	Grades	PI	AMO	YES	Grades	PLI	AMO	YES	Grades	PI	AMO	NA			
	3-8	147	135		3-8	84	89		3-8	86	89				
<b>COMPARATIVE MEASURES</b> 3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Comparison: Rochester City Schools			YES	Comparison: Rochester City Schools			YES	Comparison: Rochester City Schools			YES			
	Grades	School	District		Grades	School	District		Grades	School	District				
	3-8	53.7	20.7		3-8	22.0	5.4		3-8	19.5	5.4				
4. Each year the school will exceed its predicted percent of students at proficiency on the state exam by at least a small Effect Size (at least 0.3) based on its percentage of Economically Disadvantaged students.	% ED	Actual	Predicted	Effect Size	YES	% ED	Actual	Predicted	Effect Size	NO	% ED	Actual	Predicted	Effect Size	NO
	65.1	53.4	44.7	0.56		78.6	20.6	20.6	0.00		83.6	17.9	19.8	-0.08	
<b>GROWTH MEASURE</b> 5. Each year, the school's unadjusted mean growth percentile will meet or exceed the state's unadjusted median growth percentile.	Grades	School	State	NO	Grades	School	State	NO	Grades	School	State	YES			
	4				4	52.5				4	40.6				
	5				5	29.9				5	44.7				
	6				6	66.5				6	67.4				
	7				7	48.5				7	54.9				
	8				8	44.4				8	46.2				
	All	49.1	50.0		All	47.7	50.0		All	50.9	50.0				

# APPENDIX: PERFORMANCE SUMMARIES

## SCHOOL PERFORMANCE SUMMARY: Mathematics

### Eugenio Maria De Hostos Charter School



	2011-12 Grades Served: K-8			MET	2012-13 Grades Served: K-8			MET	2013-14 Grades Served: K-8			MET			
	Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)				
<b>ABSOLUTE MEASURES</b>															
1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.	3	85.7 (49)	90.5 (42)		3	62.7 (51)	62.0 (50)		3	52.0 (50)	53.3 (45)				
	4	86.4 (44)	85.7 (42)		4	46.3 (41)	52.9 (34)		4	48.9 (47)	51.1 (45)				
	5	53.7 (41)	55.9 (34)		5	6.8 (44)	7.0 (43)		5	45.2 (42)	43.2 (37)				
	6	87.2 (39)	90.9 (33)		6	21.1 (38)	21.2 (33)		6	57.1 (42)	63.9 (36)				
	7	85.7 (35)	90.6 (32)		7	23.5 (34)	34.8 (23)		7	15.2 (33)	21.7 (23)				
	8	57.7 (26)	59.1 (22)		8	10.0 (30)	11.5 (26)		8	15.4 (26)	16.7 (24)				
	All	77.4 (234)	80.5 (205)	YES	All	30.7 (238)	33.5 (209)	NA	All	42.1 (240)	45.2 (210)	NA			
2. Each year the school's aggregate Performance Level Index on the State exam will meet the Annual Measurable Objective set forth in the State's NCLB accountability system.	Grades	PI	AMO		Grades	PLI	AMO		Grades	PI	AMO				
	3-8	176	148	YES	3-8	104			3-8	124	86	NA			
<b>COMPARATIVE MEASURES</b>															
3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Comparison: Rochester City Schools				Comparison: Rochester City Schools				Comparison: Rochester City Schools						
	Grades	School	District		Grades	School	District		Grades	School	District				
	3-8	80.5	27.3	YES	3-8	33.5	4.9	YES	3-8	45.2	7.4	YES			
4. Each year the school will exceed its predicted percent of students at proficiency on the State exam by at least a small Effect Size (at least 0.3) based on its percentage of Economically Disadvantaged students.	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size			
	65.1	77.4	55.5	1.15	YES	78.5	30.7	22.0	0.51	YES	83.7	42.1	26.0	0.90	YES
<b>GROWTH MEASURE</b>															
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the state's unadjusted median growth percentile.	Grades	School	State		Grades	School	State		Grades	School	State				
	4				4	45.9			4	34.8					
	5				5	18.8			5	41.1					
	6				6	64.0			6	81.0					
	7				7	42.3			7	58.8					
	8				8	31.9			8	41.9					
	All	48.4	50.0	NO	All	39.9	50.0	NO	All	52.1	50.0	YES			