



**THE SUNY CHARTER SCHOOLS
INSTITUTE**

*RENEWAL RECOMMENDATION REPORT
BRONX CHARTER SCHOOL FOR
EXCELLENCE 4*

Report Date: December 7, 2022

Review Date: September 15, 2022

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Charter Schools Institute
The State University of New York

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CHARTER BACKGROUND

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

4300 Murdoch Avenue, Bronx, New York | Grades: K-4 | NYC Community School District 11
1160 East 213th Street, Bronx, New York | Grades: 5 | NYC Community School District 11



MISSION

The Bronx Charter School for Excellence 4 prepares young people in New York City to compete for admission to and succeed in top public, private, and parochial high schools by cultivating their intellectual, artistic, social, emotional, and ethical development. The Bronx Charter School for Excellence 4 accomplishes this by offering a challenging and rigorous academic curriculum, which at the earliest of grades has an eye toward college preparation. The Bronx Charter School for Excellence 4 achieves this in a supportive and caring environment that maintains high expectations for all students.

CURRENT CHARTER

Serves: Kindergarten – 5th

Chartered Enrollment:
360

Charter Expires on:
July 31, 2023

PROPOSED FUTURE CHARTER

Serves: Kindergarten – 6th

Chartered Enrollment:
420

Charter Expiration:
July 31, 2024

KEY DESIGN ELEMENTS

High academic standards;



School uniforms for students;



A broad liberal arts education;



A commitment to academic performance accountability;



Foundational academic and critical thinking skills that expand to a 21st century global perspective;



A commitment to financial accountability;



Longer school day;



Parent engagement;



Performance-based compensation for staff;



Open collaboration with the community of educators and external stakeholders; and,



Clearly articulated standards for students that encourage holistic growth;



Organizational commitment to lifelong learning and to the professional development of all staff.



CHARTER BACKGROUND

EDUCATION CORPORATION BACKGROUND



The State University of New York Board of Trustees (“the SUNY Trustees”) approved the original charter for Bronx Charter School for Excellence 4 (“Bronx Excellence 4”) on June 13, 2016. Bronx Excellence 4 opened in fall 2018 serving 120 students in Kindergarten and 1st grade. Bronx Charter School for Excellence education corporation (“Bronx Excellence Schools”) has the authority to operate a total of five charters. Originating with Bronx Charter School for Excellence (“Bronx Excellence”), which opened in fall of 2004, the education corporation expanded with the opening of Bronx Charter School for Excellence 2 (“Bronx Excellence 2”) in the fall of 2016. Each year after that, the education corporation opened Bronx Charter School for

Excellence 3 (“Bronx Excellence 3”), Bronx Excellence 4, and, most recently in fall of 2019, Bronx Charter School for Excellence 5 (“Bronx Excellence 5”). Each replication charter bases its educational program on the successful model established at Bronx Excellence and serves students in the Morris Park, Parkchester, Wakefield, and Tremont communities in the Bronx. During subsequent charter terms, if granted, each charter would continue expanding to serve students in Kindergarten – 8th grade. Bronx Excellence Schools contracts with Excellence Community Schools, Inc. (“Excellence Schools” or the “network”), a New York not-for-profit corporation, that supports each charter in the areas of curricular development, student assessment, recruitment of prospective students and staff members, professional development, legal compliance, external relations, financial management, and technology support. In addition to the five Bronx Excellence Schools, Excellence Schools supports and advises one charter school in Stamford, Connecticut.

NOTEWORTHY

Bronx Excellence Schools invests in partnerships with communities, community based organizations, colleges and universities. The Build the Bronx initiative ties these partnerships together by creating a pipeline for neighborhood residents to become Bronx Excellence Schools’ next cohort of high quality instructional staff. The initiative establishes relationships with local and regional colleges and universities with teacher and school leader preparation programs, allowing pre-service education majors to conduct field placements, practicums, residencies, and fellowships in Bronx Excellence Schools’ charters. Bronx Excellence Schools finds this program increases the dedication and longevity of its highly valued teachers.

CHARTER BACKGROUND

RESPONSE TO INTERRUPTED INSTRUCTION CAUSED BY COVID-19

During the 2021-22 school year, Bronx Excellence 4 utilized many strategies to assess, monitor, and accelerate student learning. The charter restructured its day to include intensive academic support each morning, which included a mix of whole group, small group, and one on one instruction. Enhanced academic interventions continue throughout the school day with one on one tutoring for students through a third party partnership. In the afternoons, to ensure students received a well-rounded educational experience, Bronx Excellence 4 introduced “Club Excellence,” which included partnerships and collaborations with creative professionals and guest artists in areas which included dance, musical theater, tap dancing, African dance, and drumming. Bronx Excellence 4 returned to many of the pre-pandemic strategies that have led to success at other Bronx Excellence Schools. Teachers utilized assessment data to create and frequently revise individualized instructional plans to understand each student’s exact learning needs. The charter also provided students with summer tutoring and programming to accelerate learning. To support with students in and out of attendance due to COVID-19 cases during the 2021-22 school year, Bronx Excellence 4 established a quarantine school model that provided a virtual substitute teacher for each grade level to work with students while in quarantine and isolation on daily lesson assignments so that students did not experience further interruptions to learning.

RENEWAL RECOMMENDATION

FULL-TERM RENEWAL

Renewal through July 31, 2024. *The Charter Schools Institute (the “Institute”) recommends the SUNY Trustees’ Charter Schools Committee approve the Application for Charter Renewal of Bronx Charter School for Excellence 4 through July 31, 2024 to align each related education corporation’s charter expiration and renewal schedule going forward. If renewed, the charter will be granted the authority to provide instruction to students in such configuration as set forth in the charter’s Application for Renewal. The Institute makes this recommendation as Bronx Charter School for Excellence 4 meets the requirements set forth in the Policies for 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”).¹*

The table below presents information on the Institute’s plan² to align the charter expiration dates of the charters under the education corporation. The Institute plans to conduct a full renewal review of all charters in the education corporation during the 2023-24 school year, which will be considered Bronx Excellence Schools’ charter expiration alignment year.

CHARTER	2022-23	2023-24	2024-25	2025-26	2026-27
Bronx Excellence		Charter Expiration			
Bronx Excellence 2		Alignment Year		Charter Expiration	
Bronx Excellence 3		Charter Expiration			
Bronx Excellence 4	Charter Expiration	Alignment Year			
Bronx Excellence 5		Charter Expiration			

1. SUNY Renewal Policies (p. 12) are available on the [Institute’s website](#).

2. The above plan does not guarantee a specific renewal outcome for the education corporation or any of its charter schools.

RENEWAL RECOMMENDATION

To earn an **Initial Full-Term Renewal**, a charter must either:



have compiled a strong and compelling record of meeting or coming close to meeting its academic Accountability Plan goals, and have in place at the time of the renewal review an educational program that, as assessed using the Qualitative Education Benchmarks,³ is generally effective; or,



have made progress toward meeting its academic Accountability Plan goals and have in place at the time of the renewal review an education program that, as assessed using the Qualitative Education Benchmarks, is particularly strong and effective.

REQUIRED FINDINGS

In addition to making a recommendation based on a determination of whether the charter has met the SUNY Trustees' specific renewal criteria, the Institute makes the following findings required by the New York Charter Schools Act of 1998 (as amended, the "Act"):

- 1: the charter, as described in the Application for Charter Renewal, meets the requirements of the Act and all other applicable laws, rules, and regulations;
- 2: the education corporation can demonstrate the ability to operate the charter in an educationally and fiscally sound manner in the next charter term; and,
- 3: given the programs it will offer, its structure, and its purpose, approving the charter to operate for another year is likely to improve student learning and achievement and materially further the purposes of the Act.⁴

3. The Qualitative Education Benchmarks are a subset of the State University of New York Charter Renewal Benchmarks ("SUNY Renewal Benchmarks") which are available on the [Institute's website](#).

4. See New York Education Law § 2852(2).

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Bronx Excellence 4 is an academic success having met or come close to meeting its key Accountability Plan goals. The charter implements the same program elements found in all Bronx Excellence Schools charters. For more information about the educational program please see Appendix B: Benchmark Summary. The information below demonstrates the key findings for the SUNY Trustees and highlights the successes of the charter.

FINDINGS & INFORMATION

Is the charter an academic success?

Bronx Excellence 4 is an academic success. The Institute's evaluation finds that the charter replicates the existing, high performing program evident at all Bronx Excellence Schools with fidelity. That program, in place for 19 years at Bronx Excellence, seven years at Bronx Excellence 2, and six years at Bronx Excellence 3, has proven to be particularly strong and effective. The charter demonstrates academic success in the following ways:

- Bronx Excellence 4 met its Accountability Plan goals in both English language arts ("ELA") and mathematics in its first year with reliable state testing results performing at 52% and 60% proficient, respectively;
- Bronx Excellence 4 outperformed its district in spring 2022 by 21 and 29 percentage points in ELA and mathematics, respectively; and,
- In 2021-22, 58% of students with disabilities at Bronx Excellence 4 passed the ELA state exam.

Is the charter an effective, viable organization?

Bronx Excellence 4 is an effective, viable organization. The Bronx Excellence Schools' board governance of the education corporation and oversight of the network and charter leadership provide clear academic and financial accountability structures. The network supports many aspects of the charter's operations, which allows elementary and middle school program principals to focus on effectively leading the academic program.

Is the charter fiscally sound?

Bronx Excellence 4 is fiscally sound based on evidence collected through the renewal review. The education corporation met its fiscal benchmarks throughout the charter term and presents a reasonable and appropriate fiscal plan for the next charter term, if granted.

If the SUNY Trustees renew the charter, are the education corporation's plans for the charter reasonable, feasible, and achievable?

Bronx Excellence 4's plans for the future, if renewed, are reasonable, feasible, and achievable. The charter will continue growing its program as a replication of the existing high performing Bronx Excellence Schools during the next charter term. If renewed, the charter will develop its middle school program with the same elements that have been successful at the education corporation's other middle school programs. The board plans to continue to recruit members who have close community ties with the Bronx.

EXECUTIVE SUMMARY

Based on the Institute’s review of the charter’s performance as posted over the charter term; a review of the Application for Charter Renewal submitted by the education corporation; a review of academic, organizational, governance, and financial documentation; and a renewal review of the charter’s academic program, the Institute finds that the charter meets the required criteria for renewal.

The Institute recommends that the SUNY Trustees grant Bronx Charter School for Excellence 4 an Initial Charter Renewal with an expiration date of July 31, 2024 to align the charter expiration dates of all Bronx Excellence Schools.



DP

DATA PRESENTATION

PAGES: 9-16

AP

ACADEMIC
PERFORMANCE

CP

COMPLIANCE
PERFORMANCE

CS

COMMUNITY
SATISFACTION

SD

STUDENT
DEMOGRAPHICS

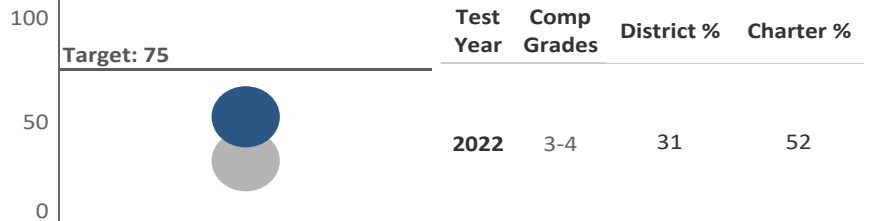


ACADEMIC PERFORMANCE

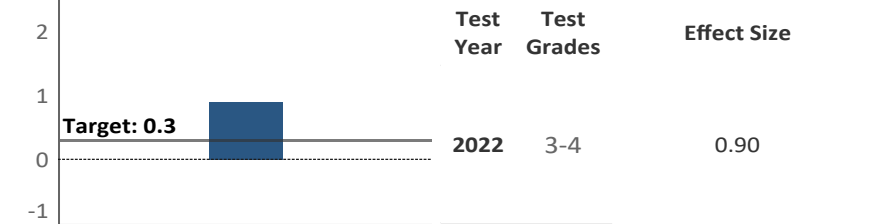
BRONX CHARTER SCHOOL FOR EXCELLENCE 4

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

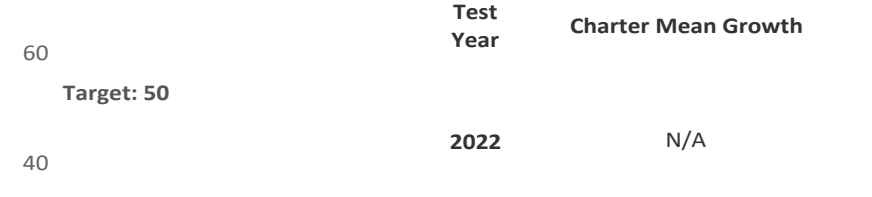
District Comparison. The percentage of students at **the charter** performing at or above proficiency in ELA compared to the district.



Effect Size. The chart shows charter's effect size above its predicted level of performance in **ELA** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.

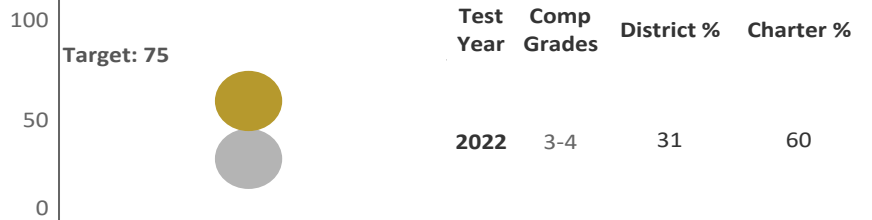


Comparative Growth Measure: Mean Growth Percentile. The charter's unadjusted mean growth percentile for all students in grades 4-8 will be above target of 50 in **ELA**.

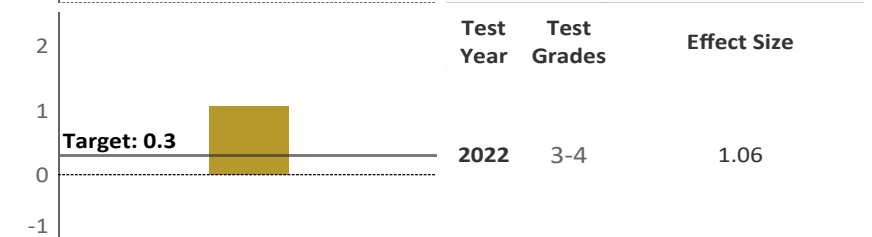


MATHEMATICS ACCOUNTABILITY PLAN GOAL

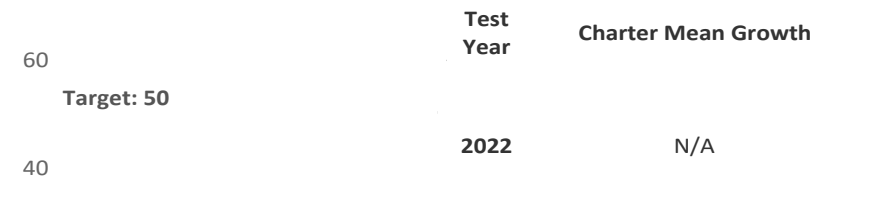
District Comparison. The percentage of students at **the charter** performing at or above proficiency in mathematics compared to the district.



Effect Size. The chart shows charter's effect size above its predicted level of performance in **mathematics** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.



Comparative Growth Measure: Mean Growth Percentile. The charter's unadjusted mean growth percentile for all students in grades 4-8 will be above target of 50 in **mathematics**.

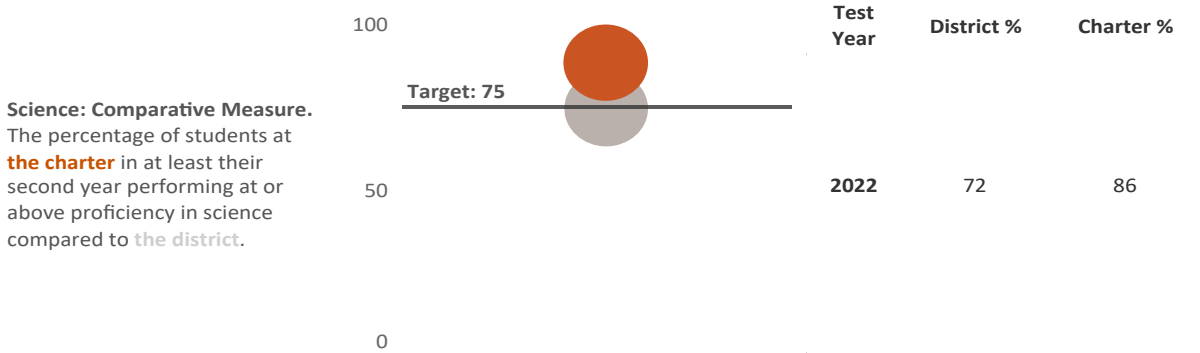




ACADEMIC PERFORMANCE

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

SCIENCE ACCOUNTABILITY PLAN GOAL



SPECIAL POPULATIONS PERFORMANCE*

	2019	2022
Students with Disabilities Enrollment	12	44
Tested on State Exam	0	19
Charter Percent Proficient on ELA Exam	N/A	57.9
District Percent Proficient	N/A	8.1
ELL Enrollment	5	12
Tested on NYSESLAT Exam	5	12
Charter Percent 'Commanding' or Making Progress	s	33.3

* The academic outcome data about the performance of students receiving special education services and English language learners ("ELLs") above is not tied to separate goals in the charter school's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam. "Making Progress" is defined as moving up at least one level of proficiency. Student scores fall into five categories/proficiency levels: Entering; Emerging; Transitioning; Expanding; and, Commanding. In order to comply with Family Educational Rights and Privacy Act regulations on reporting education outcome data, the Institute does not report assessment results for groups containing five or fewer students and indicates this with an "s".

ACADEMIC PERFORMANCE



HAS THE CHARTER MET OR COME CLOSE TO MEETING ITS ACADEMIC ACCOUNTABILITY PLAN GOALS?

Bronx Excellence 4 first enrolled students in state testing grades during the 2020-21 school year. Although the New York State Education Department (“NYSED”) administered statewide assessments in ELA and mathematics that year, the results are unreliable due to low participation rates. The Institute considers the New York State exam results in 2021-22 credible and reliable and will deem it the first data point for Bronx Excellence 4. That year, the charter posted high proficiency rates in ELA, mathematics, and science. Although Bronx Excellence 4 produced only a limited set of achievement data, the elementary program replicates the same effective program found at other Bronx Excellence Schools, which have demonstrated a consistent record of high achievement. The charter also met its science and Every Student Succeeds Act (“ESSA”) goals over the term.

Bronx Excellence 4 met its ELA and mathematics goals during its initial charter term. In 2021-22, the charter’s students enrolled in at least their second year posted proficiency rates of 52% and 60% in ELA and mathematics, respectively. The charter outperformed the district in both subjects and performed higher than expected to a large degree in comparison to demographically similar schools across the state. Although Bronx Excellence 4 has yet to generate student growth percentiles, Bronx Excellence Schools consistently demonstrates high growth in both ELA and mathematics across all its charters implementing the same education program model.

Given the absence of reliable and credible performance data from the state’s ELA and mathematics assessments for 3rd – 8th grade students in 2019-20 and 2020-21, the Institute worked with charters and testing experts to develop a set of performance measures for use with internal and nationally normed assessments. The Institute continues to analyze each charter’s internal assessments to evaluate the charter’s academic attainment in lieu of reliable state exam data in 2020-21 and to contextualize the baseline state exam data from 2021-22.

During the 2020-21 and 2021-22 school years, Bronx Excellence 4 demonstrated academic success against its key academic Accountability Plan goals using internally developed assessments and a composite proficiency calculation that combined students’ assessment results, course grades, and class participation among other factors. The charter defines proficiency as having mastered at least 75% of course content. In 2021-22, 66% of the charter’s students in 3rd and 4th grade enrolled in at least their second year achieved this ELA measure established by the charter and approved by the Institute. In mathematics, 51% of students achieved this distinction.

COMPLIANCE REPORTING



HAS THE EDUCATION CORPORATION SUBSTANTIALLY COMPLIED WITH APPLICABLE LAWS, RULES AND REGULATIONS, AND PROVISIONS OF ITS CHARTER?

The education corporation substantially complies with applicable laws, rules and regulations, and provisions of its charter. During the current charter term, the education corporation demonstrates a clear record of compliance with the terms of its charter including the timely submission of required reporting to the Institute.

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

Annual Reports

Bronx Excellence 4 submitted its annual reports to the Institute and the New York State Education Department (“NYSED”) on time but the charter has not posted the annual reports on its website in accordance with the charter and the Act. The Institute will ensure compliance prior to the start of the next charter term.

FOIL

The charter has an appropriate Freedom of Information Law (“FOIL”) policy except it fails to link to the site for the New York State Committee on Open Government as required. In addition, the charter’s website fails to provide a FOIL subject matter list with link. The Institute will follow up with the school to update the policy prior to the next charter term.

Violations

The Institute issued a violation letter regarding the provision of special education teacher support services (“SETSS”) during a portion of the first year of the charter term due to staffing. The charter was fully compliant by the second year of the charter term and worked with the district committee on special education (“CSE”) to determine any compensatory services, if applicable.

Teacher Certification

The Act allows charters to hire up to 15 uncertified faculty members contingent upon those teachers meeting certain requirements including: two years of Teach for America experience; three years of teaching experience; status as a higher education professor; exceptional experience in a subject; or, teaching science, technology, engineering, and mathematics (STEM) or career and technical education courses. At the time of the renewal review, the school is within the allowable limit of uncertified teachers and all uncertified teachers meet the appropriate qualifications under the Act.

The charter’s “Build the Bronx” initiative focuses on sourcing lifelong educators from the community and for the community supporting a pipeline for high-quality instructional staff as well as the longevity and retention of community teachers. Establishing relationships with teacher and school leader preparation programs at local and regional colleges and universities including Monroe College, NYU Steinhardt, and Manhattanville College, these partnerships allow pre-service education majors to conduct field placements, practicums, residencies/fellowships, and student teaching hours in the education corporation’s schools. Successful graduates then start in Education Associate positions with growth opportunities to become lead teachers and school leaders.

COMMUNITY SATISFACTION

To report on parent satisfaction with the charter’s program, the Institute used satisfaction survey data and data regarding persistence in enrollment.

PARENT SATISFACTION: SURVEY RESULTS

RESPONSE RATE	OVERALL SATISFACTION	INCLUSIVE LEADERSHIP	FAMILY INVOLVEMENT	STRONG RELATIONSHIPS
77%	90%	88%	87%	92%

Parent Survey Data

The Institute compiled data from the New York City Department of Education’s (“NYCDOE’s”) annual family survey from 2021-22. In 2021-22, 77% of families who received the survey responded. Of the families who responded, 90% expressed satisfaction with the charter.

Public Comments

In accordance with the Act, the Institute notified the district in which the charter school is located regarding the Application for Charter Renewal. The full text of any written comments received from the district appears below, which also includes a summary of any public comments.

The NYCDOE held its required hearing on Bronx Excellence 4’s renewal application on November 21, 2022 by videoconference. The charter’s principal spoke of its mission to prepare students to compete and succeed in top high schools by cultivating intellectual, artistic, social, emotional, and ethnic development. No one spoke in opposition of the application.

Persistence in Enrollment

An additional indicator of parent satisfaction is persistence in enrollment. In 2021-22, 78% of Bronx Excellence 4 students returned from the previous year. Student persistence data from previous years of the charter term is available in student demographics section of the report.

The Institute derived the statistical information on persistence in enrollment from its database. No comparative data from the NYCDOE or the NYSED is available to the Institute to provide either district or statewide context.

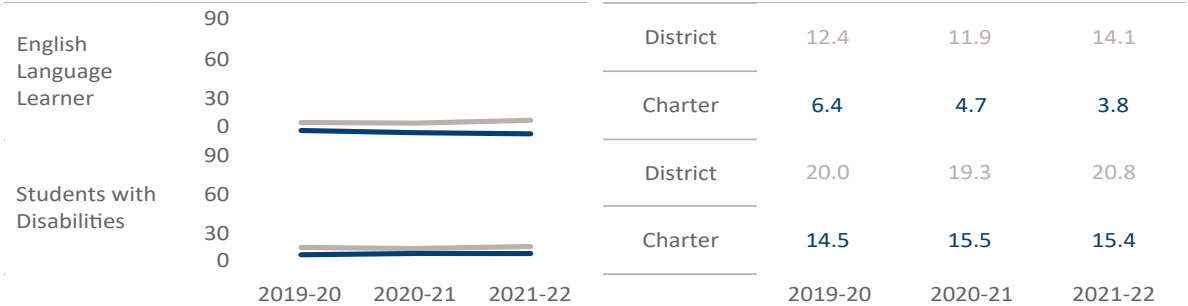


STUDENT DEMOGRAPHICS

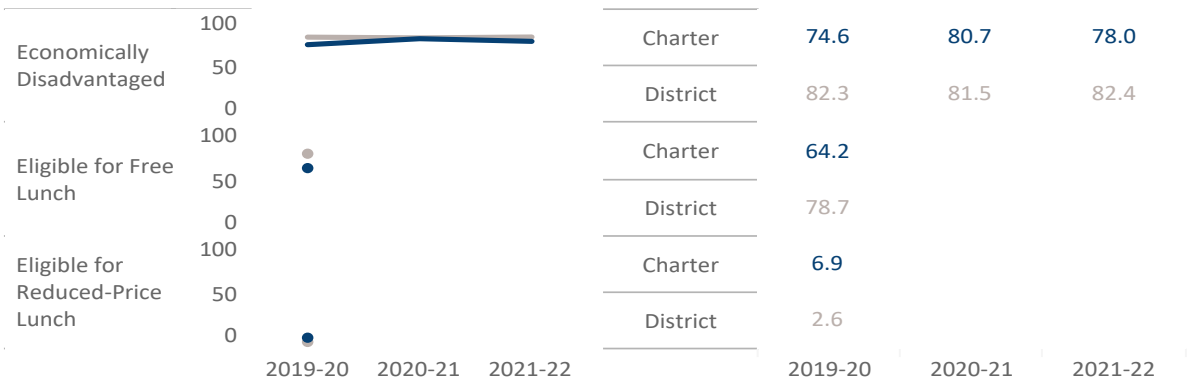
Bronx Charter School for Excellence 4

Bronx CSD 11

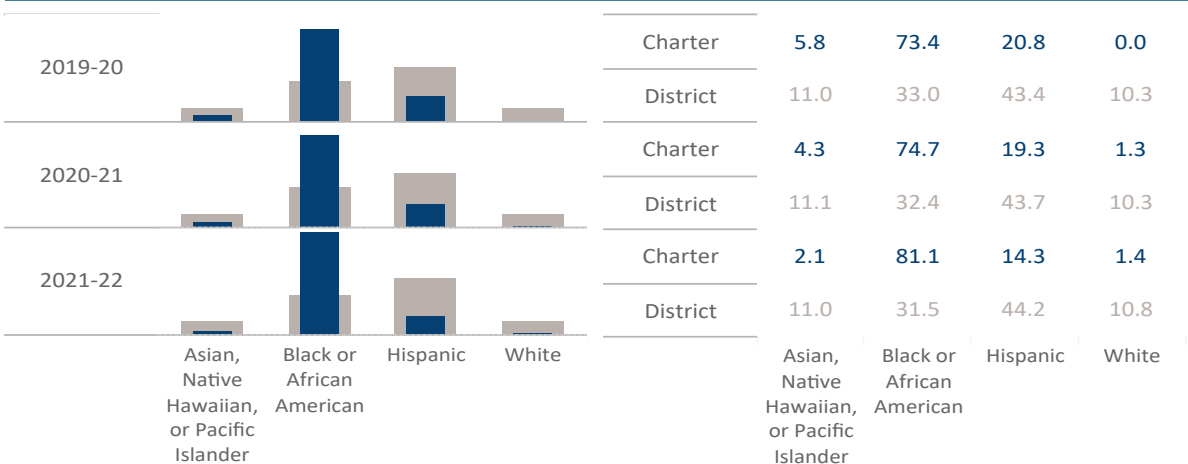
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



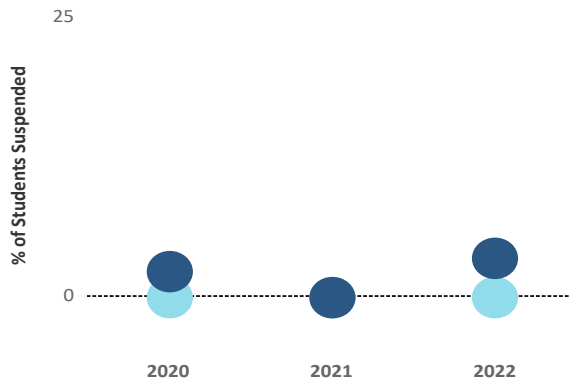
Student Demographics: Race/Ethnicity



* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED except for the charter's 2020-21 ELL enrollment which reflects data reported by the education corporation and validated by the Institute.

STUDENT DEMOGRAPHICS

Bronx Charter School for Excellence 4



Bronx CSD 11

	ISS Rate	OSS Rate
2020	0.0	2.3
2021	0.0	0.0
2022	0.0	3.5

Data suitable for comparison are not available. The percentage rate shown here is calculated using the method employed by NYCDOE: the total number of students receiving an in school or out of school suspension at any time during the school year is divided by the total enrollment, then multiplied by 100.

Persistence in Enrollment: The percentage of students eligible to return from previous year who did return

2019-20	90.5
2020-21	90.2
2021-22	77.7

Expulsions: The number of students expelled from the charter each year

	2020	2021	2022
	0	0	0

Bronx Charter School for Excellence 4's Enrollment and Retention Status: 2021-22

		Target	Charter
enrollment	economically disadvantaged	86.2	77.3
	English language learners	9.8	3.8
	students with disabilities	16.3	15.4
retention	economically disadvantaged	93.6	76.9
	English language learners	92.7	54.5
	students with disabilities	93.4	77.8

* Data reported in these charts reflect information reported by the education corporation and validated by the Institute.

STUDENT DEMOGRAPHICS

ENROLLMENT AND RETENTION TARGETS

As required by Education Law § 2851(4)(e), a charter must include in its renewal application information regarding the efforts it 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. The Institute examines each school's progress toward meeting or coming close to meeting its targets over the charter term as well as the efforts it has and will put in place to meet or continue to meet those targets.

Bronx Excellence 4, with support from the network, makes good faith efforts to meet its enrollment and retention targets. The charter conducts the following recruitment efforts:

- Attending open houses, public meetings, and other open events at community organizations in proximity to Bronx Excellence 4;
- Canvassing in the community in areas with high concentrations of low income families;
- Advertising on public transit locations and other media outlets, especially those that predominantly serve families who speak languages other the English and serve economically disadvantaged families;
- Providing translation and interpretation of all materials and events to ensure access to families who speak languages other than English; and,
- Including information on the charter's special education and ELL programs in all materials advertising Bronx Excellence 4.

FISCAL ANALYSIS

IS THE EDUCATION CORPORATION FISCALLY SOUND?

Bronx Excellence Schools is fiscally sound as is its charter, Bronx Excellence 4, based on the Institute’s analysis of the fiscal evidence collected through the renewal review. The SUNY Fiscal Dashboard presents color-coded tables and charts indicating that Bronx Excellence 4 and the education corporation have demonstrated fiscal soundness over the majority of the charter term.⁵ The fiscal dashboard for Bronx Excellence 4 and the merged education corporation can be found at the end of this section. The discussion that follows relates mainly to the Bronx Excellence Schools education corporation because a charter is not a legally distinct fiscal entity.



The network supports Bronx Excellence Schools in curricular development, student assessment, recruiting, training, professional development, financial management, and technology under the terms of a management contract that includes a 13% management fee over the charter term. The financial model ensures each fully enrolled charter is financially sustainable, operating the academic program solely through public funding.

In addition to analyzing the soundness of the individual charter schools, the Institute analyzed the soundness of the not-for-profit education corporation granted the authority to operate the charter and finds it too has adequate financial resources to ensure stable operations.



DOES THE EDUCATION CORPORATION OPERATE PURSUANT TO A FISCAL PLAN IN WHICH IT CREATES REALISTIC BUDGETS THAT IT MONITORS AND ADJUSTS WHEN APPROPRIATE?

The education corporation operates pursuant to a long-range financial plan in which it creates realistic budgets that it monitors and adjusts when appropriate. The following elements are generally present:

INDICATORS	EVIDENT?
The education corporation has clear budgetary objectives and budget preparation procedures for the charter.	+
Board members, charter management, and staff members contribute to the budget process for the charter, as appropriate.	+

5. 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.

“+” : This indicator is generally present.

“-” : This indicator is generally not present.

“P” : The education corporation is progressing toward this indicator being present.

“N/A” : This indicator is not applicable.

FISCAL ANALYSIS

The education corporation frequently compares its long-range fiscal plan for the charter to actual progress and adjusts it to meet changing conditions. **+**

The education corporation routinely analyzes budget variances for the charter; the education corporation board addresses material variances and makes necessary revisions. **+**

Actual expenses are equal to, or less than, actual revenue with no material exceptions. **+**

DOES THE EDUCATION CORPORATION MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

The education corporation maintains, and the charter implements, appropriate internal controls and procedures. The following elements are generally present:

INDICATORS	EVIDENT?
The education corporation has a history of sound fiscal policies, procedures and practices, and appropriate internal controls at the charter.	+
The most recent education corporation audit report, which covers fiscal operations for the charter, was free of any significant deficiencies or material weaknesses in internal controls.	+
The education corporation reviews and updates its Financial Policies and Procedures Manual (“FPPM”), which covers the charter, on a regular basis. The most recent review of the FPPM is found in the next column. The Institute recommends, as a best practice, that the education corporation review and update its FPPM on an annual basis.	JUNE 2022

DOES THE EDUCATION CORPORATION COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

The education corporation complies with financial reporting requirements by providing the SUNY Trustees and NYSED with required financial reports that are on time, complete, and follow generally accepted accounting principles. The following reports, which include information about the charter, are filed in a timely, accurate, and complete manner:

INDICATORS	EVIDENT?
Annual financial statement audit reports, including federal Single Audit report, if applicable.	+
Annual budgets.	+

FISCAL ANALYSIS

Un-audited quarterly reports of income, expenses, and enrollment. **+**

Bi-monthly enrollment reports to the sending districts and, if applicable, to NYSED including proper documentation regarding the level of special education services provided to students. **+**

Grant expenditure reports. **+**

DOES THE EDUCATION CORPORATION MAINTAIN ADEQUATE FINANCIAL RESOURCES TO ENSURE STABLE OPERATIONS?

The education corporation maintains adequate financial resources for the charter to ensure stable operations. Critical financial needs of the charter are not dependent on variable income (grants, donations, and fundraising). The following elements are generally present:

INDICATORS	EVIDENT?
The education corporation maintains sufficient cash on hand to pay current bills of the charter and those that are due shortly.	+
The education corporation maintains adequate liquid reserves to fund expenses, including those of the charter, in the event of income loss (generally 30 days).	+
The education corporation prepares and monitors cash flow projections for the charter.	+
If the education corporation includes philanthropy in its budget for the charter, it monitors progress toward its development goals on a periodic basis.	N/A
If necessary, the education corporation pursues district state aid intercepts with NYSED to ensure adequate per pupil funding for the charter.	N/A

FISCAL ANALYSIS

The education corporation accumulates unrestricted net assets that are equal to or exceed two percent of the charter’s operating budget for the upcoming year.



The education corporation is in compliance with all loan covenants related to the charter.



The charter reported operating surpluses in each year of the charter term building \$2.3 million in net assets and contributing to the \$34.8 million in net assets of the merged education corporation as of June 30, 2021. The education corporation benefits from a combined balance sheet, which is a combination of individual schools’ assets and liabilities. To monitor the operations of any individual charter within a merged education corporation, the Institute tracks each charter’s revenues and expenses, reporting operating surpluses or deficits. The merged education corporation is fiscally strong with 3.1 months of cash on hand to pay liabilities due shortly as of June 30, 2021. As a requirement of charter agreements, Bronx Excellence Schools established the separate bank account for the merged dissolution fund reserve of the required \$225,000 for the five operating charters as of June 30, 2021. The Institute is reviewing 2022 annual audits and anticipates continued fiscal health.

FISCAL ANALYSIS

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

NOTE: Effective 2018-19, the charter merged finances with the education corporation, "Bronx Charter School for Excellence." Accordingly, see the education corporation report containing the "Balance Sheet" for all charters merged into the education corporation.

CHARTER INFORMATION

BALANCE SHEET

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

Deferred Rent/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
NYC DoE Rental Assistance

Food Service/Child Nutrition Program

Total Operating Revenue

Expenses

Regular Education
SPED
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 2018-19				
		MERGED	MERGED	MERGED	
	2016 17	2017 18	2018 19	2019 20	2020 21
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	-	-	-	-	-
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	-	-	-	-	-
Deferred Rent/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
Resident Student Enrollment	-	-	1,661,533	2,808,185	3,819,506
Students with Disabilities	-	-	75,130	181,190	409,307
State and local	-	-	158,718	14,206	13,778
Federal - Title and IDEA	-	-	56,574	126,432	177,905
Federal - Other	-	-	110,176	68,064	173,492
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	332,907	367,150	1,060,000
Food Service/Child Nutrition Program	-	-	-	-	-
Total Operating Revenue	-	-	2,395,038	3,565,227	5,653,988
Regular Education	-	-	1,368,467	2,005,813	3,647,729
SPED	-	-	208,581	429,548	934,091
Other	-	-	-	-	-
Total Program Services	-	-	1,577,048	2,435,361	4,581,820
Management and General	-	-	125,944	199,538	414,052
Fundraising	-	-	2,254	38	-
Total Expenses - GRAPHS 2, 3 & 4	-	-	1,705,246	2,634,937	4,995,872
Surplus / (Deficit) From School Operations	-	-	689,792	930,290	658,116
Contributions	-	-	-	13,037	-
Fundraising	-	-	-	-	-
Miscellaneous Income	-	-	-	-	-
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	-	-	-	13,037	-
Total Unrestricted Revenue	-	-	2,395,038	3,578,264	5,653,988
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	-	-	2,395,038	3,578,264	5,653,988
Change in Net Assets	-	-	689,792	943,327	658,116
Net Assets - Beginning of Year - GRAPH 2	-	-	-	689,792	1,633,119
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	-	-	689,792	1,633,119	2,291,235

FISCAL ANALYSIS

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

NOTE: Effective 2018-19, the charter merged finances with the education corporation, "Bronx Charter School for Excellence." Accordingly, see the education corporation report containing the "Balance Sheet" for all charters merged into the education corporation.

CHARTER INFORMATION - (Continued)

Functional Expense Breakdown

	2016 17	2017 18	2018 19	2019 20	2020 21
Personnel Service	-	-	111,892	248,619	537,835
Administrative Staff Personnel	-	-	382,861	694,992	1,113,288
Instructional Personnel	-	-	150,000	295,989	51,820
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	-	644,753	1,239,600	1,702,943
Fringe Benefits & Payroll Taxes	-	-	236,071	318,945	530,619
Retirement	-	-	-	-	-
Management Company Fees	-	-	219,470	389,307	549,746
Building and Land Rent / Lease / Facility Financing	-	-	261,830	389,216	1,694,518
Staff Development	-	-	(15)	2,681	4,873
Professional Fees, Consultant & Purchased Services	-	-	107,106	143,768	290,491
Marketing / Recruitment	-	-	2,440	1,443	11,613
Student Supplies, Materials & Services	-	-	137,022	78,154	48,210
Depreciation	-	-	3,123	3,866	65,129
Other	-	-	93,446	67,957	97,730
Total Expenses	-	-	1,705,246	2,634,937	4,995,872

CHARTER ANALYSIS

ENROLLMENT

	2016 17	2017 18	2018 19	2019 20	2020 21
Original Chartered Enrollment	-	-	120	180	360
Final Chartered Enrollment (includes any revisions)	-	-	120	180	360
Actual Enrollment - GRAPH 4	-	-	106	172	236
Chartered Grades	-	Planning Year	K-1	K-2	K-2
Final Chartered Grades (includes any revisions)	-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2016 17	2017 18	2018 19	2019 20	2020 21
Increase over prior year	0.0%	0.0%	0.0%	100.0%	5.2%

PER STUDENT BREAKDOWN

Revenue	2016 17	2017 18	2018 19	2019 20	2020 21
Operating	-	-	22,666	20,752	23,921
Other Revenue and Support	-	-	-	76	-
TOTAL - GRAPH 3	-	-	22,666	20,828	23,921
Expenses	2016 17	2017 18	2018 19	2019 20	2020 21
Program Services	-	-	14,925	14,176	19,385
Management and General, Fundraising	-	-	1,213	1,162	1,752
TOTAL - GRAPH 3	-	-	16,138	15,337	21,137
% of Program Services	0.0%	0.0%	92.5%	92.4%	91.7%
% of Management and Other	0.0%	0.0%	7.5%	7.6%	8.3%
% of Revenue Exceeding Expenses - GRAPH 5	0.0%	0.0%	40.5%	35.8%	13.2%
% of Revenue Expended on Facilities	#DIV/0!	#DIV/0!	10.9%	10.9%	30.0%

Student to Faculty Ratio

	2016 17	2017 18	2018 19	2019 20	2020 21
Student to Faculty Ratio	-	-	17.6	13.2	12.4

Faculty to Admin Ratio

	2016 17	2017 18	2018 19	2019 20	2020 21
Faculty to Admin Ratio	-	-	6.0	4.3	3.8

Financial Responsibility Composite Scores - GRAPH 6

Score	2016 17	2017 18	2018 19	2019 20	2020 21
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	0.0	0.0	0.0	0.0	0.0
	N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

Net Working Capital	2016 17	2017 18	2018 19	2019 20	2020 21
Net Working Capital	0	0	0	0	0
As % of Unrestricted Revenue	0.0%	0.0%	0.0%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

Score	2016 17	2017 18	2018 19	2019 20	2020 21
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	N/A	N/A	N/A

Debt to Asset Ratio - GRAPH 7

Score	2016 17	2017 18	2018 19	2019 20	2020 21
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	N/A	N/A	N/A

Months of Cash - GRAPH 8

Score	2016 17	2017 18	2018 19	2019 20	2020 21
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	N/A	N/A	N/A	N/A

FISCAL ANALYSIS

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

CHARTER INFORMATION

BALANCE SHEET

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

Deferred Rent/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
NYC DoE Rental Assistance

Food Service/Child Nutrition Program

Total Operating Revenue

Expenses

Regular Education
SPED
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

	MERGED 2016 17	MERGED 2017 18	MERGED 2018 19	MERGED 2019 20	MERGED 2020 21
Cash and Cash Equivalents - GRAPH 1	4,058,737	6,312,887	12,314,675	17,322,873	8,407,848
Grants and Contracts Receivable	537,248	1,425,882	943,191	762,754	1,211,156
Accounts Receivable	-	-	-	-	-
Prepaid Expenses	74,434	207,048	250,099	413,517	578,652
Contributions and Other Receivables	452,070	282,337	298,803	887,116	1,738,240
Total Current Assets - GRAPH 1	5,122,489	8,228,154	13,806,768	19,386,260	11,935,896
Property, Building and Equipment, net	33,122,435	32,845,287	32,041,208	31,550,369	32,361,764
Other Assets	2,681,705	3,141,176	3,263,292	3,196,069	19,080,375
Total Assets - GRAPH 1	40,926,629	44,214,617	49,111,268	54,132,698	63,378,035

Accounts Payable and Accrued Expenses	755,560	974,445	893,023	470,872	761,940
Accrued Payroll and Benefits	487,364	782,444	1,094,985	2,131,125	2,703,306
Deferred Revenue	4,061	39,753	258,391	49,782	64,931
Current Maturities of Long-Term Debt	470,000	485,000	-	-	-
Short Term Debt - Bonds, Notes Payable	-	-	505,000	525,000	545,000
Other	1,841,071	569,995	731,852	318,720	95,049
Total Current Liabilities - GRAPH 1	3,558,056	2,851,637	3,483,251	3,495,499	4,170,226
Deferred Rent/Lease Liability	-	552,578	697,217	1,018,372	1,488,136
All other L-T debt and notes payable, net current maturities	25,191,170	24,567,596	24,055,958	23,521,481	22,964,244
Total Liabilities - GRAPH 1	28,749,226	27,971,811	28,236,426	28,035,352	28,622,606

Without Donor Restrictions	12,177,403	16,242,806	20,649,842	25,872,346	34,755,429
With Donor Restrictions	-	-	225,000	-	-
Total Net Assets	12,177,403	16,242,806	20,874,842	26,097,346	34,755,429
Total Liabilities and Net Assets	40,926,629	44,214,617	49,111,268	54,132,698	63,378,035

Resident Student Enrollment	13,373,465	16,796,018	21,809,994	27,315,182	31,560,337
Students with Disabilities	1,013,401	838,744	1,114,456	1,377,588	2,809,727

State and local	262,412	327,787	257,100	138,051	132,285
Federal - Title and IDEA	468,772	720,124	1,129,719	1,127,911	1,273,973
Federal - Other	159,571	573,129	348,050	382,948	1,235,040
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	1,150,953	1,345,517	1,821,587	3,499,172
Food Service/Child Nutrition Program	-	473,517	467,487	266,461	210,800
Total Operating Revenue	15,277,621	20,880,272	26,472,323	32,429,728	40,721,334

Regular Education	8,366,370	13,806,892	17,511,569	21,308,912	24,065,246
SPED	1,366,235	2,079,189	2,728,494	4,233,336	5,430,611
Other	-	-	-	-	-
Total Program Services	9,732,605	15,886,081	20,240,063	25,542,248	29,495,857
Management and General	1,368,518	994,369	1,615,421	1,813,864	2,579,876
Fundraising	24,066	436	25,120	580	-
Total Expenses - GRAPHS 2, 3 & 4	11,125,189	16,880,886	21,880,604	27,356,692	32,075,733
Surplus / (Deficit) From School Operations	4,152,432	3,999,386	4,591,719	5,073,036	8,645,601

Contributions	120,767	11,505	-	43,073	538
Fundraising	41,889	30,250	-	-	-
Miscellaneous Income	105,862	24,262	40,317	106,395	11,944
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	268,518	66,017	40,317	149,468	12,482

Total Unrestricted Revenue	15,546,139	20,946,289	26,512,640	32,579,196	40,733,816
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	15,546,139	20,946,289	26,512,640	32,579,196	40,733,816
Change in Net Assets	4,420,950	4,065,403	4,632,036	5,222,504	8,658,083
Net Assets - Beginning of Year - GRAPH 2	7,756,453	12,177,403	16,242,806	20,874,842	26,097,346
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	12,177,403	16,242,806	20,874,842	26,097,346	34,755,429

FISCAL ANALYSIS

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

CHARTER INFORMATION - (Continued)

Functional Expense Breakdown

	2016 17	2017 18	2018 19	2019 20	2020 21
Personnel Service	241,094	621,709	1,297,673	1,880,446	3,902,199
Administrative Staff Personnel	2,501,875	3,747,075	5,053,544	7,087,052	8,809,001
Instructional Personnel	675,178	1,083,247	2,334,321	2,778,171	121,943
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	3,418,147	5,452,031	8,685,538	11,745,669	12,833,143
Fringe Benefits & Payroll Taxes	960,456	1,443,344	2,183,799	3,291,389	4,127,632
Retirement	-	-	-	-	-
Management Company Fees	1,834,483	2,244,243	2,897,481	3,698,128	4,468,108
Building and Land Rent / Lease / Facility Financing	316,254	1,391,727	1,404,428	2,635,435	4,030,153
Staff Development	26,993	14,100	47,443	63,443	117,942
Professional Fees, Consultant & Purchased Services	1,306,933	1,554,792	1,824,071	1,280,046	2,091,346
Marketing / Recruitment	9,536	22,519	37,154	24,000	98,347
Student Supplies, Materials & Services	553,687	619,162	824,083	865,134	444,992
Depreciation	862,947	1,015,524	1,117,445	1,190,046	1,390,798
Other	1,835,752	3,123,444	2,859,162	2,563,402	2,473,272
Total Expenses	11,125,188	16,880,886	21,880,604	27,356,692	32,075,733

CHARTER ANALYSIS

ENROLLMENT

	2016 17	2017 18	2018 19	2019 20	2020 21
Original Chartered Enrollment	848	1,056	1,296	1,770	2,160
Final Chartered Enrollment (includes any revisions)	848	1,086	1,356	1,770	2,160
Actual Enrollment - GRAPH 4	926	1,131	1,383	1,671	1,955
Chartered Grades	-	-	-	-	-
Final Chartered Grades (includes any revisions)	-	-	-	-	-

Primary School District:

Per Pupil Funding (Weighted Avg of All Districts)
Increase over prior year

	2016 17	2017 18	2018 19	2019 20	2020 21
	-	-	-	-	-
	0.0%	0.0%	0.0%	0.0%	0.0%

PER STUDENT BREAKDOWN

Revenue

	2016 17	2017 18	2018 19	2019 20	2020 21
Operating	16,504	18,469	19,136	19,409	20,824
Other Revenue and Support	290	58	29	89	6
TOTAL - GRAPH 3	16,794	18,528	19,165	19,498	20,831

Expenses

	2016 17	2017 18	2018 19	2019 20	2020 21
Program Services	10,514	14,052	14,631	15,287	15,084
Management and General, Fundraising	1,504	880	1,186	1,086	1,319
TOTAL - GRAPH 3	12,019	14,932	15,817	16,372	16,403
% of Program Services	87.5%	94.1%	92.5%	93.4%	92.0%
% of Management and Other	12.5%	5.9%	7.5%	6.6%	8.0%
% of Revenue Exceeding Expenses - GRAPH 5	39.7%	24.1%	21.2%	19.1%	27.0%
% of Revenue Expended on Facilities	2.1%	6.7%	5.3%	8.1%	9.9%

Student to Faculty Ratio

	2016 17	2017 18	2018 19	2019 20	2020 21
	21.5	19.8	22.0	14.2	13.4

Faculty to Admin Ratio

	2016 17	2017 18	2018 19	2019 20	2020 21
	3.9	4.4	4.5	4.7	4.2

Financial Responsibility Composite Scores - GRAPH 6

Score
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 /
Fiscally Needs Monitoring < 1.0

	2016 17	2017 18	2018 19	2019 20	2020 21
Score	2.5	2.7	2.8	3.0	3.0
Rating	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong

Working Capital - GRAPH 7

Net Working Capital
As % of Unrestricted Revenue
Working Capital (Current) Ratio Score
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)

	2016 17	2017 18	2018 19	2019 20	2020 21
Net Working Capital	1,564,433	5,376,517	10,323,517	15,890,761	7,765,670
As % of Unrestricted Revenue	10.1%	25.7%	38.9%	48.8%	19.1%
Working Capital (Current) Ratio Score	1.4	2.9	4.0	5.5	2.9
Risk	MEDIUM	MEDIUM	LOW	LOW	MEDIUM
Rating	Good	Good	Excellent	Excellent	Good

Quick (Acid Test) Ratio

Score
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)

	2016 17	2017 18	2018 19	2019 20	2020 21
Score	1.4	2.8	3.9	5.4	2.7
Risk	MEDIUM	LOW	LOW	LOW	LOW
Rating	Good	Excellent	Excellent	Excellent	Excellent

Debt to Asset Ratio - GRAPH 7

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

	2016 17	2017 18	2018 19	2019 20	2020 21
Score	0.7	0.6	0.6	0.5	0.5
Risk	MEDIUM	MEDIUM	MEDIUM	MEDIUM	MEDIUM
Rating	Good	Good	Good	Good	Good

Months of Cash - GRAPH 8

Score
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)

	2016 17	2017 18	2018 19	2019 20	2020 21
Score	4.4	4.5	6.8	7.6	3.1
Risk	LOW	LOW	LOW	LOW	LOW
Rating	Excellent	Excellent	Excellent	Excellent	Excellent

FUTURE PLANS



IF THE SUNY TRUSTEES RENEW THE CHARTER, ARE THE EDUCATION CORPORATION’S PLANS FOR THE CHARTER REASONABLE, FEASIBLE, AND ACHIEVABLE?

Bronx Excellence 4 is an academic success supported by an effective, viable organization. Both the charter and education corporation are fiscally sound and present sound financial plans. As such, the plans for Bronx Excellence Schools to operate Bronx Excellence 4 for the next charter term are reasonable, feasible, and achievable.

BRONX CHARTER SCHOOL FOR EXCELLENCE 4

Plans for the Charter’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.

Plans for the Educational Program. Bronx Excellence 4 plans to continue to implement the same core elements of its educational program that enabled the charter to meet or exceed its key Accountability Plan goals in the current charter term. These elements are likely to enable the charter to meet or come close to meeting its academic goals in the next charter term. In addition to continuing its effective elementary program, Bronx Excellence 4 will continue growing its middle school program and implement the same core elements from Bronx Excellence Schools’ other middle school programs. The Institute anticipates Bronx Excellence 4 will to apply for the remaining middle school grade levels at the time of the full education corporation renewal that will occur during the 2023-24 school year.

Plans for Board Oversight & Governance. Trustees express interest in continuing to serve Bronx Excellence Schools in the next charter term. The board is also looking to expand its membership by adding more community based members.

Fiscal & Facility Plans. Based on evidence collected through the renewal review, including a review of the five year financial plan, Bronx Excellence Schools presents a reasonable and appropriate fiscal plan for the next charter term including education corporation and school budgets that are feasible and achievable. The education corporation intends to maintain its contractual relationship with the network. The Institute has reviewed the proposed terms of such contract and will review and approve the final contract, and any other network contracts, when executed.

Bronx Excellence 4 will continue to operate its elementary program in the existing private leased facility. The charter established a lease agreement for a facility that houses its fifth grade with capacity to accommodate middle school expansion, pending approval of those grades. The two facilities would provide the necessary amenities needed to operate the program.

	CURRENT	END OF NEXT CHARTER TERM
Enrollment	360	420
Grade Span	K-5	K-6
Teaching Staff	21	24
Days of Instruction	180	180

Bronx
Excellence 4

Ax

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BRONX CHARTER SCHOOL FOR EXCELLENCE BOARD OF TRUSTEES

CHAIR	TRUSTEES
Kathleen Lathen	Stacey Lauren, Trustee Lena Rumpfelt, Ex-Officio Trustee
VICE CHAIR	
Joyce Frost	
TREASURER	
Joseph Lewis	
SECRETARY	
Mardi J. Schecter	

EXCELLENCE COMMUNITY SCHOOLS

CHAIR	TRUSTEES
Joyce Frost	Kory Apton William Geist
VICE PRESIDENT	
Kim Hartman	
TREASURER	
Rishi Renjen	
SECRETARY	
Anthony Vernace	

CHARTER LEADERS

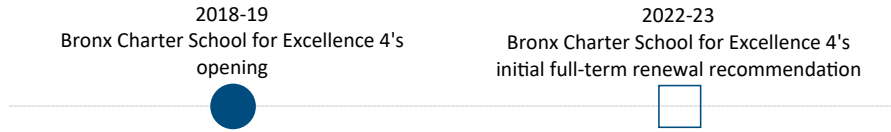
PRINCIPAL
<i>Florence Bolton, Elementary (2020-21 to Present)</i>
<i>Andre Williams, Middle School (2021-22 to Present)</i>
<i>Tonya White, Lower Elementary (2018-19 to 2021-22)</i>

CHARTER CHARACTERISTICS

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2018-19	120	106	88%	K-1
2019-20	180	172	96%	K-2
2020-21	360	236	66%	K-3
2021-22	300	296	99%	K-4
2022-23	360	340	94%	K-5



TIMELINE OF CHARTER SCHOOL RENEWAL



CHARTER SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2018-19	First Year	May 22, 2019
2022-23	Renewal Review	September 15, 2022

CONDUCT OF THE RENEWAL REVIEW

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
September 15, 2022	Andrew Kile	Managing Director of School Evaluation

BENCHMARK SUMMARY

For strong performing SUNY authorized charter schools that implement a common school design across multiple charters, the Institute provides an analysis and description of the charters' academic design structure using the Qualitative Education Benchmarks. This subset of the SUNY Renewal Benchmarks focuses on assessment, curriculum, pedagogy, leadership, at-risk programs, organizational capacity, and board oversight. The following program description analyzes and reports on the charter design that produced the high quality outcomes captured in the body of this renewal report.

ASSESSMENT

Bronx Excellence Schools deploys a robust assessment system that improves instructional effectiveness and student learning. Charters administer a variety of diagnostic, formative, and summative assessments to create an accurate snapshot of student achievement across all subject areas. The charters typically administer the NWEA MAP ("MAP") assessment, the Fountas & Pinnell Benchmark Assessment System ("F&P") for reading, and a series of other formative assessments. Teachers consistently administer and analyze results from daily exit tickets to react quickly to data to determine specific interventions, small groupings, or reteaching, as needed. Specifically for 2020-21, with the lack of accurate state test data, the charters adjusted assessment programs to analyze student achievement based on internally developed assessments including student work, lesson participation, engagement, exit tickets, and other assessments that occur on a regular basis. This adjustment includes using a weekly quick check to constantly monitor student progress and achievement. In returning to a full in-person teaching schedule for 2021-22, Bronx Excellence Schools re-initiated its assessment program, and teachers utilize assessment data to create individualized intervention plans for each student to support mitigating interrupted instruction.

CURRICULUM

Bronx Excellence Schools provides its charters with comprehensive curricular resources to support teachers in instructional planning. The network provides each charter with sets of curricular programs and resources to guide teaching and learning. For English language arts ("ELA"), elementary level teachers utilize Journeys, and middle school level teachers implement the Collections curriculum. In mathematics, the charters utilize Eureka Math for the elementary and middle school programs. The science program aligns to Next Generation Science Standards with the use of the Amplify curriculum. Each charter has a systematized process in which teachers create and submit weekly lesson plans to academic deans and content area specialists for feedback. In lower elementary grades, teachers rehearse lessons regularly with one another for immediate feedback. In other grades, leaders work with teachers during grade level meetings to review and discuss lesson plans. These cohesive systems for developing, reviewing, and delivering high quality lessons based on standards aligned, research based curricular programs and informed by a rigorous assessment system that provides accurate data aligned to the rigor of state performance standards allow leaders and teachers to meet the specific learning needs of each student. Network level staff members collect feedback from each charter annually regarding the implementation of the curricular programs and make adjustments as necessary. In addition to the core content areas, Bronx Excellence Schools offers a wide range of additional courses to benefit students in the arts and other areas, some of which include computer science courses where students learn coding and application design. The education corporation also offers many extracurricular activities including sports, learning from leaders at Google and Amazon, and access to a summer STEM program at Colgate University.

PEDAGOGY

High quality instruction is evident across all Bronx Excellence Schools. Lessons are purposeful and each contains a clear, standards aligned objectives and a seamless flow of activities. Teachers consistently utilize an exit ticket at the end of each lesson to check for understanding and plan scripted lessons with specific details on how to adjust teaching based on student responses. Lessons contain multiple opportunities to check for understanding and utilize effective strategies such as circulating the classroom, conferencing with students, and other quick checks. Lessons also challenge students with opportunities for higher order thinking. Teachers not only ask students to explain their own or peers' thinking, but also ask students to elaborate on ideas previously presented. As much as is possible, teachers prompt students to relate learning to real life situations and foster students' depth of understanding. Across each charter, teachers maintain classrooms that focus on academic attainment. Classrooms are print rich to help facilitate learning. Teachers utilize many pacing techniques, like countdown timers, to instill a sense of urgency and maintain an appropriate pace for learning. During the remote and hybrid learning periods, teachers transitioned many of the high quality teaching practices to the remote learning environment and increased the use of technology to facilitate learning.

INSTRUCTIONAL LEADERSHIP

Bronx Excellence Schools has systems and structures in place to establish consistently strong instructional leadership across all of the education corporation's charters. The key to the charters' success lies within leaders' unwavering expectations and belief that all students can succeed. Leaders reiterate these expectations through clear messaging and by holding teachers to high expectations for meeting the needs of students. The education corporation's elementary and middle school programs each have principals and academic deans to support teaching and learning. Leaders have clear structures in place for supporting teachers including frequent, differentiated observation and feedback cycles, grade team meetings, and professional development. Leaders provide timely, actionable feedback to teachers based on assessment data to drive the quality of instruction. On an annual basis, leaders set specific priorities tailored to each charter's needs. Network leaders support principals by providing opportunities for collaboration and sharing across charters. The charters' resulting overall academic achievement is high with each charter meeting or coming close to meeting its key academic Accountability Plan goals.

AT RISK PROGRAM

Bronx Excellence Schools has programs in place to meet the educational needs of students struggling academically, students with disabilities, and ELLs. The network director of student services provides clear oversight and support to each charter to ensure each program is compliant and high quality. Each charter has clear systems for identifying subgroups of students including a clear referral process to the Response to Intervention ("RTI") program, precise procedures for referring students for special education services through the district Committee on Special Education ("CSE"), and the proper systems for evaluating a students' English proficiency level to determine ELL status. The charters infuse intervention work throughout the day and teachers review student formative data to adjust teaching and learning. The charters dedicate time in the schedule for intervention and small group work. Starting in 2021-22, Bronx Excellence Schools began enlisting individual volunteers from each charter's respective community to establish and create a tutor corps,

partnering students with community volunteers during a tutoring period to help students with specific content area needs. For students with disabilities, each charter provides Special Education Teacher Support Services (“SETSS”), Integrated Co-Teaching (“ICT”) classrooms, and other related services. For ELLs, the charters implement an English immersion program that integrates listening, speaking, reading, and writing skills into the general ELA program with specific targeted supports for ELLs. Teachers regularly conduct progress monitoring through each charter’s assessment system. The network provides consistent and high quality professional development to support teachers with strategies for elevating the achievement of each subgroup of students. All these supports and efforts, including the charters’ culture of vigilant caring and responsibility for students, have led to high achievement for both students with disabilities and ELLs. In 2018-19, two Bronx Excellence Schools with New York State testing results for students with disabilities far exceeded the district’s and state’s proficiency rates in both ELA and mathematics for all students at grade level.

ORGANIZATIONAL CAPACITY

Bronx Excellence Schools establishes an organizational structure that works effectively to deliver the educational program. At the network level, leaders create a robust support structure to ensure that each charter and principal has the support and resources to effectively run each charter. With support from the network, directors of operations at each charter have the tools to ensure that principals and academic leaders can primarily focus on the academic program. The network and charters ensure that clear reporting lines are in place, and staff members know who to go to for what. Bronx Excellence Schools establishes a clear pipeline for leaders. As the education corporation continues to grow, the network hires principal residents to shadow existing principals to eventually move into a principal position at a new charter. The network also taps into teacher talent and expands its network support teams with internal candidates that demonstrate expertise in specific areas to increase impact across all charters. Bronx Excellence Schools provides students with resources that support successful learning. The charters hired additional social workers to provide mandated and as-needed counseling for students and meet the overall increased need for mental health support as a result of the COVID-19 pandemic. Bronx Excellence Schools’ two to one laptop program, where each student has access to a laptop at school and one at home, reduces the burden of transporting materials to and from school. Bronx Excellence Schools also builds a strong culture of community both within each school’s walls as well as with the surrounding communities. The charters leverage partnerships with Bronx colleges and universities and seek to hire individuals who reside within the communities where the schools are located.

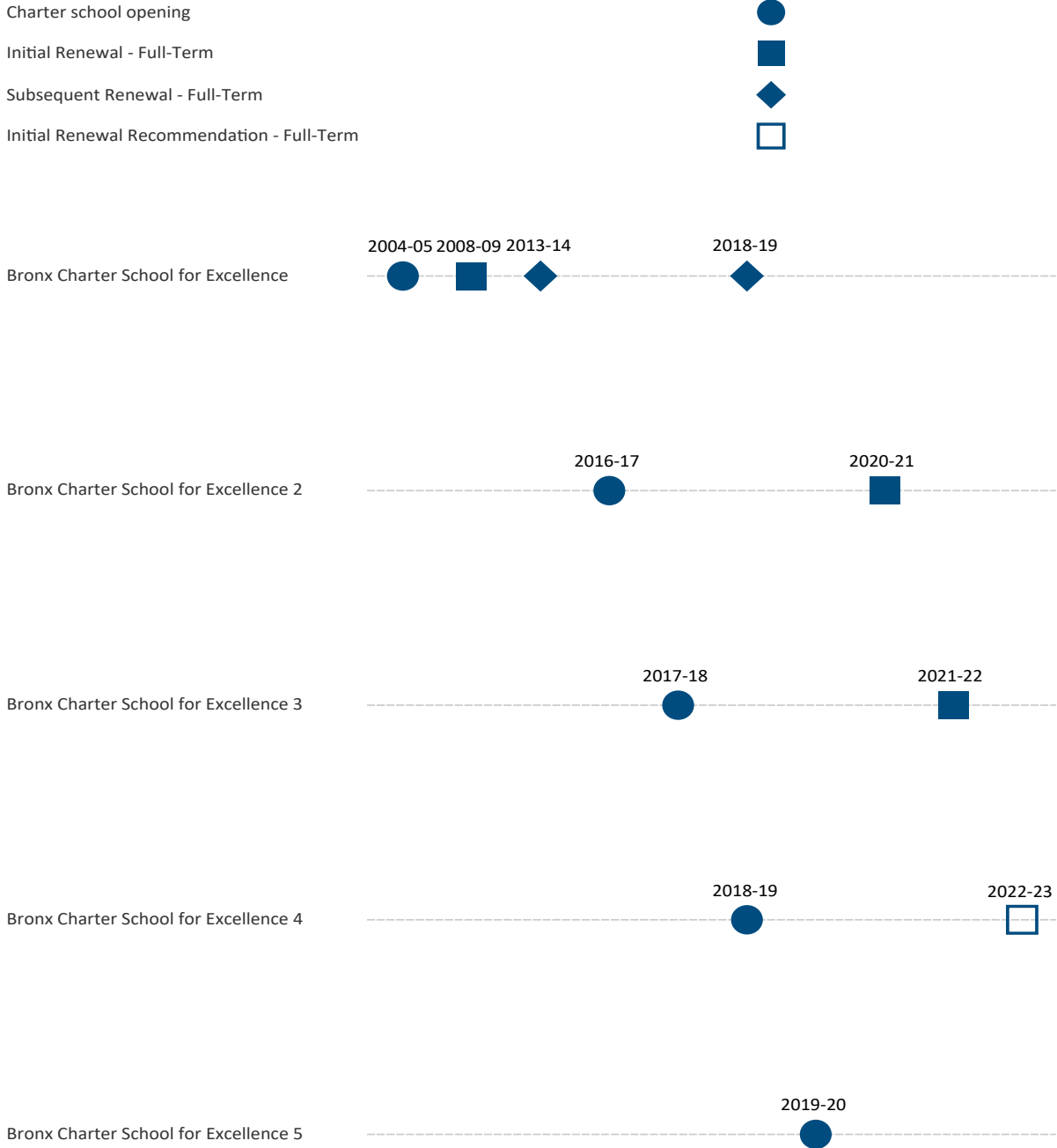
BOARD OVERSIGHT AND GOVERNANCE

The Bronx Excellence Schools board works effectively to achieve each school’s Accountability Plan goals. The board successfully provides oversight and governance to the five charters in the education corporation. The board partners with Excellence Community Schools, Inc. With replication, the education corporation board has built its processes to focus on engaging primarily with charter management organization (“CMO”) leadership in order to hold its charters and the CMO accountable for running the schools. The CMO and board agreed on reporting structures that allow network leadership to report on each school, which leaves principals and school-based staff members to focus primarily on delivering an excellent educational program. The board is strategic in requesting, analyzing, and acting on data the network presents at monthly meetings. The board reviews a wide range of data including academic, operational, and financial information to make decisions and engage with external partners to build its skills as it has evolved over the past few years.

The board materially and substantially implements, maintains, and abides by appropriate policies, systems, and processes to ensure the effective governance and oversight of the education corporation. It regularly reviews and updates policies, avoids conflicts of interest, and implements a process for handling complaints. Continually abiding by its bylaws, the board reflected on its diversity and continues to seek members from each community where schools are located.



EDUCATION CORPORATION TIMELINE OF CHARTER RENEWAL





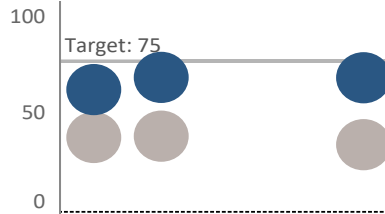
EDUCATION CORPORATION CHARTER CHARACTERISTICS

CHARTER	LOCAL DISTRICT	CO LOCATED	CHARTERED ENROLLMENT	GRADE SPAN
Bronx Charter School for Excellence	Bronx CSD 11	No	810	K-8
Bronx Charter School for Excellence 2	Bronx CSD 11	No	480	K-7
Bronx Charter School for Excellence 3	Bronx CSD 11	No	510	K-6
Bronx Charter School for Excellence 4	Bronx CSD 11	No	360	K-5
Bronx Charter School for Excellence 5	Bronx CSD 10	No	300	K-4



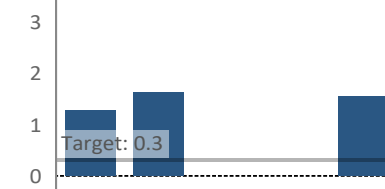
**BRONX CHARTER SCHOOL FOR EXCELLENCE
AGGREGATE ENGLISH LANGUAGE ARTS AND MATHEMATICS PERFORMANCE**

Composite District Comparison.* The chart shows the percentage of students enrolled in at least their second year at **the education corporation's charters** performing at or above proficiency in comparison to that of students in the same tested grades in those charters' local districts.



Test Year	Districts %	Ed.Corp. %
2018	37	61
2019	38	67
2020	N/A	N/A
2021	N/A	N/A
2022	34	67

Effect Size. Charters are expected to exceed the predicted level of performance by an effect size of 0.3 or above. The chart shows a weighted average effect size for **all education corporation charters** administering state exams.



Test Year	Ed. Corp. Weighted Effect Size
2018	1.28
2019	1.61
2020	N/A
2021	N/A
2022	1.55

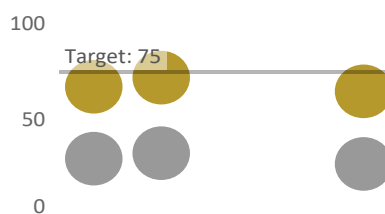
Mean Growth Percentile. The chart shows the unadjusted mean growth percentile for all students in grades 4-8 among **all education corporation charters**.



Test Year	Ed. Corp. Mean Growth Percentile
2018	44.8
2019	53.4
2020	N/A
2021	N/A
2022	N/A

EDUCATION CORPORATION AGGREGATE MATHEMATICS PERFORMANCE

Composite District Comparison.* The chart shows the percentage of students enrolled in at least their second year at **the education corporation's charters** performing at or above proficiency in comparison to that of students in the same tested grades in those charters' local districts.



Test Year	Districts %	Ed.Corp. %
2018	30	67
2019	33	72
2020	N/A	N/A
2021	N/A	N/A
2022	28	65

Effect Size. Charters are expected to exceed the predicted level of performance by an effect size of 0.3 or above. The chart shows a weighted average effect size for **all education corporation charters** administering state exams.



Test Year	Ed. Corp. Weighted Effect Size
2018	1.54
2019	1.73
2020	N/A
2021	N/A
2022	1.72

Mean Growth Percentile. The chart shows the unadjusted mean growth percentile for all students in grades 4-8 among **all education corporation charters**.

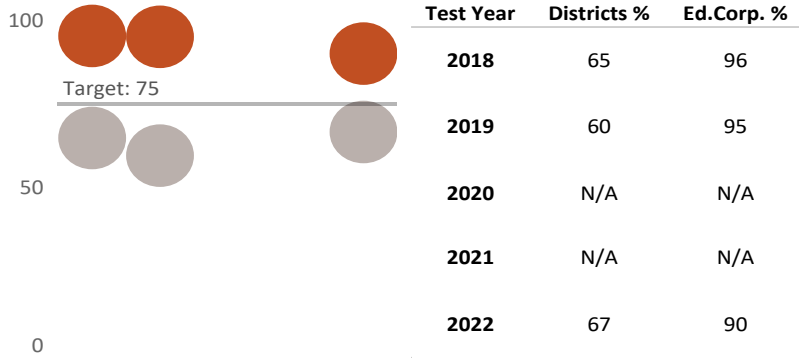


Test Year	Ed. Corp. Mean Growth Percentile
2018	51.4
2019	57.7
2020	N/A
2021	N/A
2022	N/A

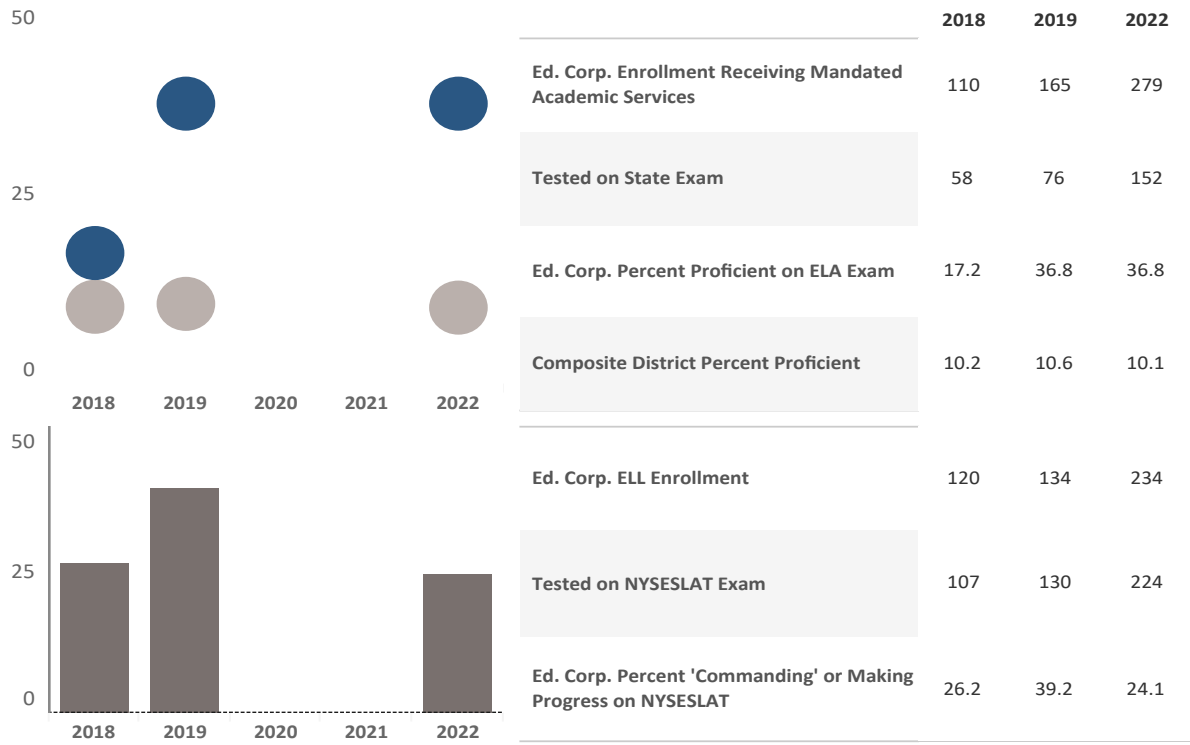


**BRONX CHARTER SCHOOL FOR EXCELLENCE
AGGREGATE SCIENCE PERFORMANCE**

Composite District Comparison. The chart shows the percentage of students enrolled in at least their second year at the education corporation performing at or above proficiency in comparison to that of students in the same tested grades in those charters' local districts.



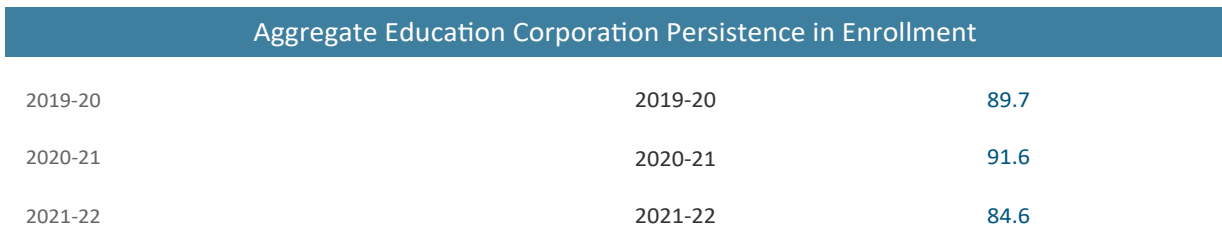
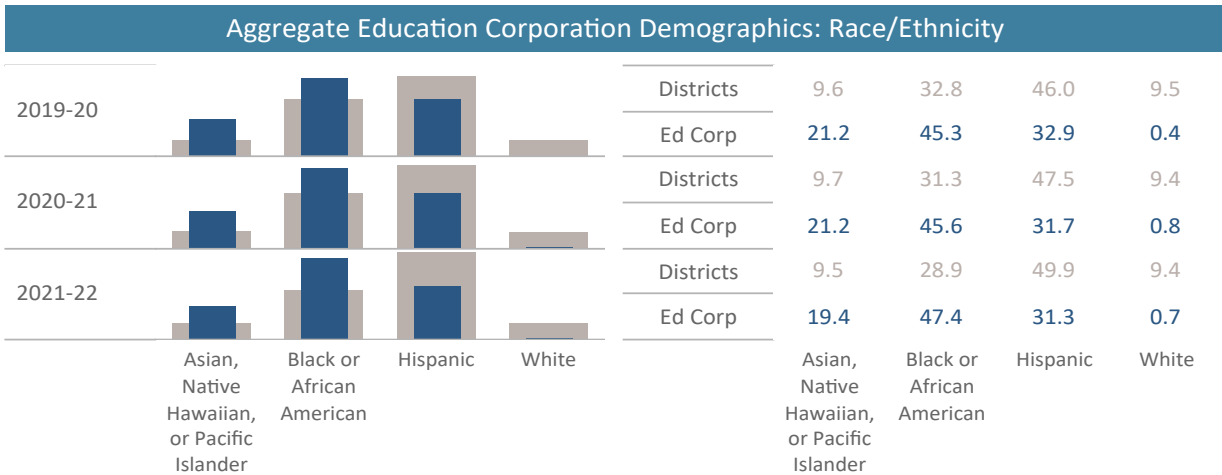
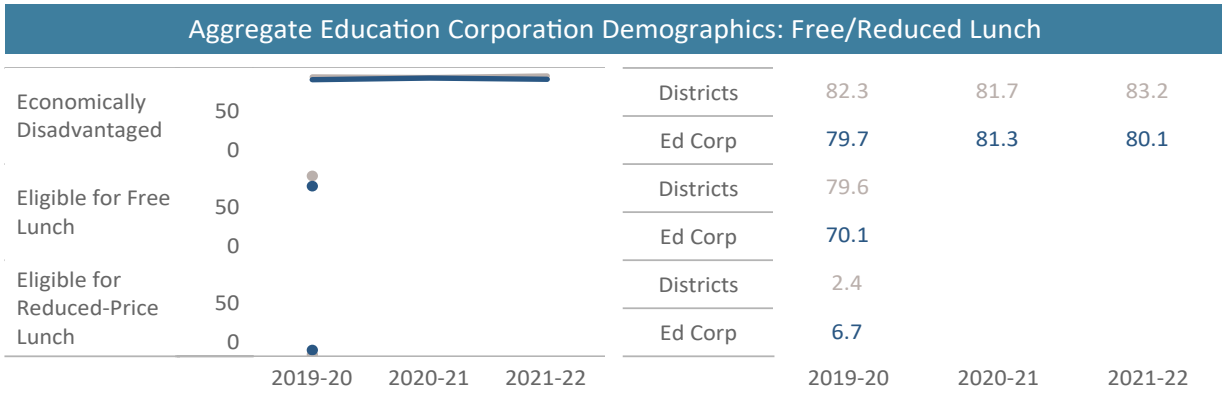
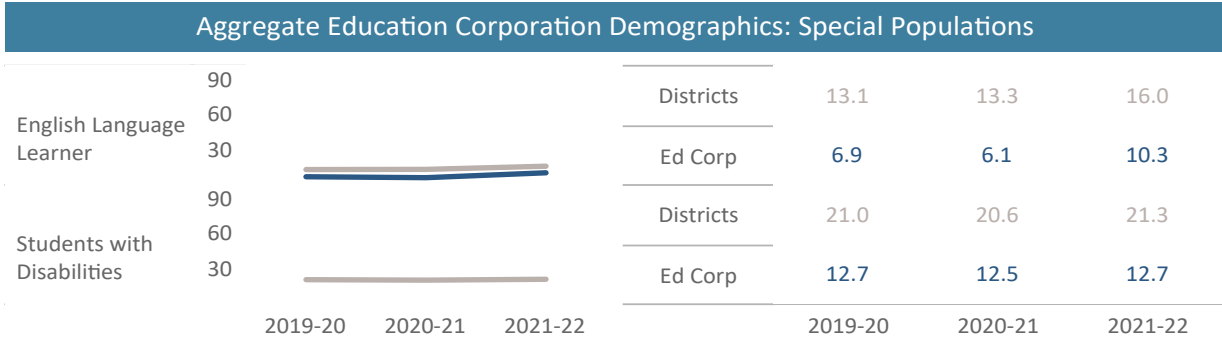
AGGREGATE PERFORMANCE OF STUDENTS WITH DISABILITIES AND ELLS FOR EDUCATION CORPORATION*



*The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in a charter's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam. "Making Progress" is defined as moving up at least one level of proficiency. Student scores fall into five categories/proficiency levels: Entering; Emerging; Transitioning; Expanding; and, Commanding.

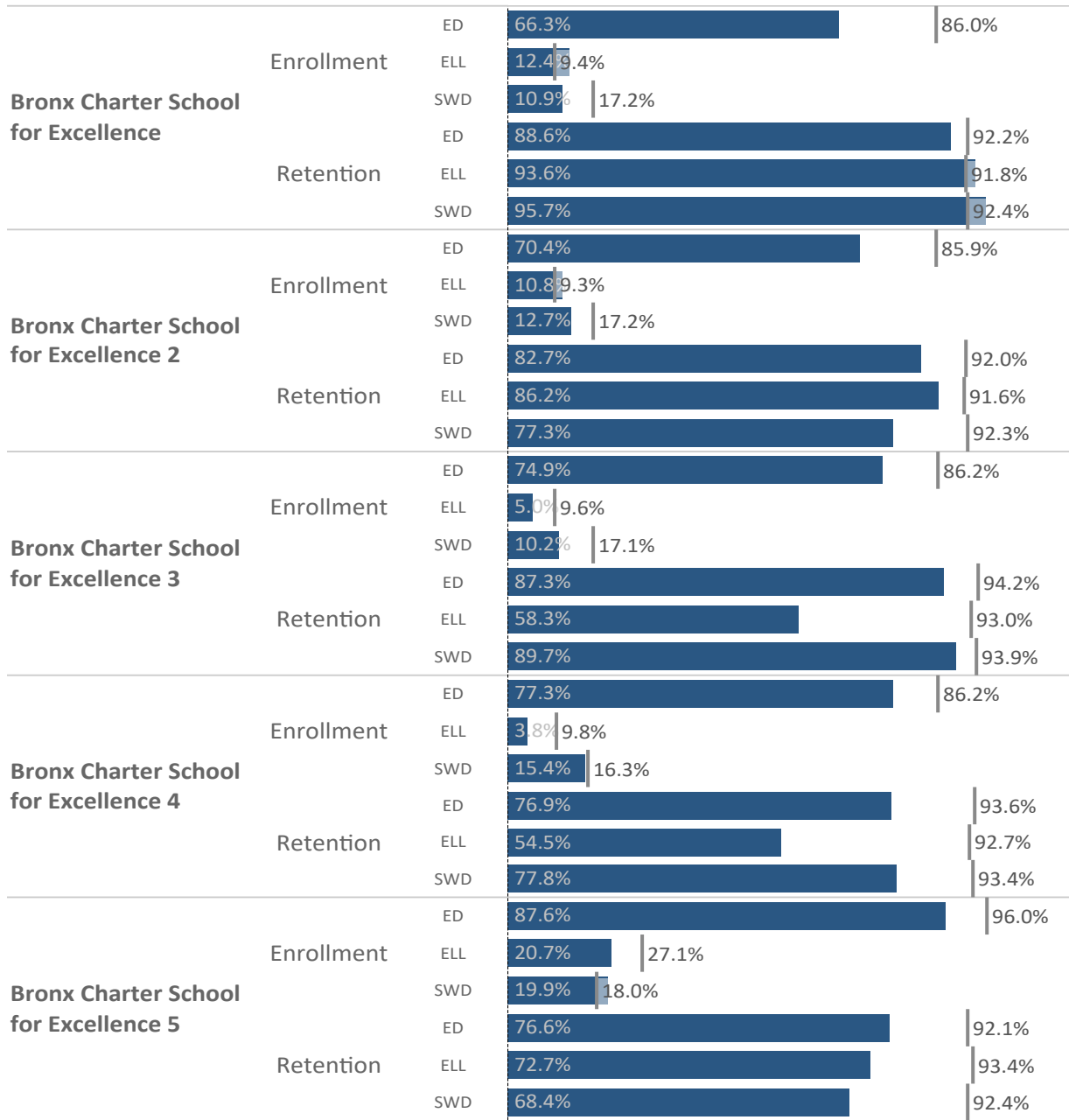


Bronx Charter School for Excellence Aggregate Education Corporation Enrollment and Persistence





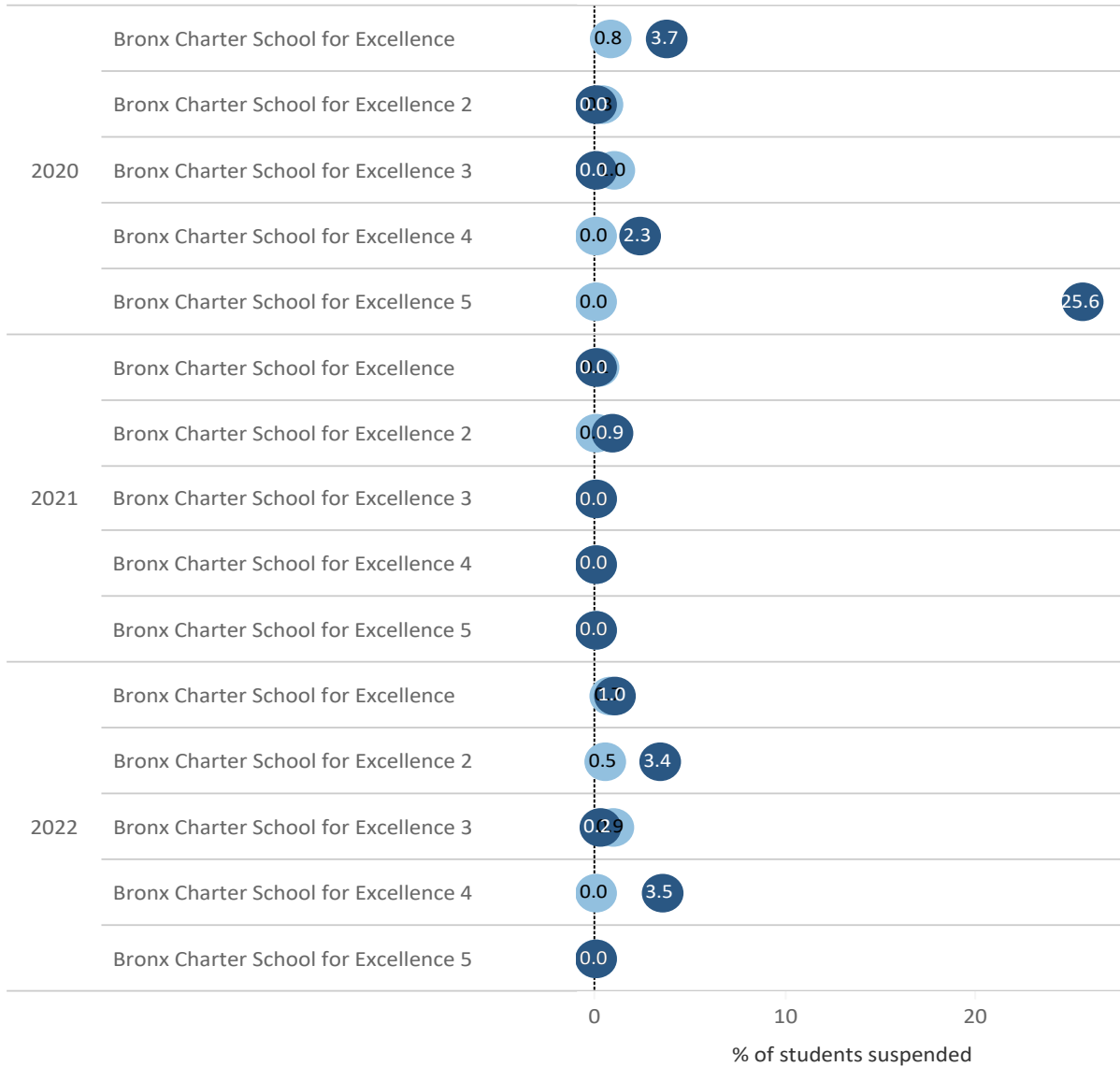
ENROLLMENT AND RETENTION TARGETS



The chart illustrates the **current enrollment and retention percentages** against the **enrollment and retention targets** for each operating charter in the education corporation. As required by Education Law § 2851(4)(e), a charter 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, ELLs, and FRPL students. This analysis is based on the most recent enrollment and retention data supplied to the Institute by the education corporation.



Suspensions: The education corporation's out of school suspension rate and in school suspension rate.



Data suitable for comparison are not available. The percentage rate shown here is calculated using the method employed by the NYCDOE: the total the number of students receiving an out of school suspension at any time during the school year is divided by the total enrollment, then multiplied by 100.

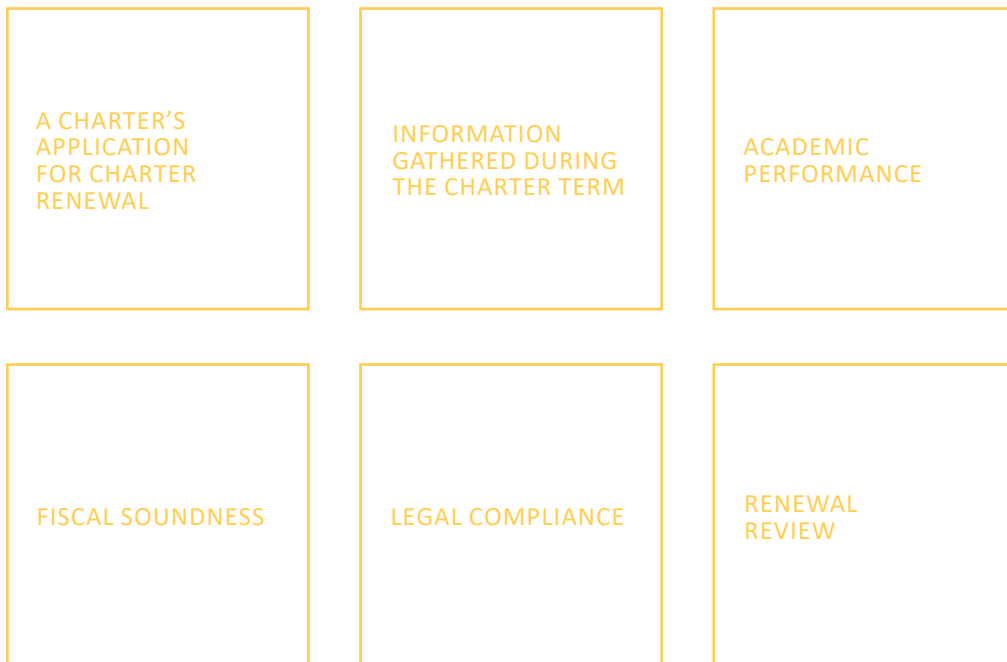
During the most recent school year, the education corporation expelled 0 students.

The sections below contain general information about the SUNY Trustees’ and Institute’s approach to renewal.

REPORT FORMAT

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 charter school’s Application for Charter Renewal, and more broadly, details the merits of a charter’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”).¹

THE INSTITUTE MAKES ALL RENEWAL RECOMMENDATIONS BASED ON



Most importantly, the Institute analyzes the charter’s record of academic performance and the extent to which it has met its academic Accountability Plan goals.

1. Revised September 4, 2013 and available on the [Institute’s website](#).

This renewal recommendation report compiles evidence using the *State University of New York Charter Renewal Benchmarks* (the “SUNY Renewal Benchmarks”),² which specify in detail what a successful charter 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 charter has made an adequate case for renewal.

RENEWAL QUESTIONS



IS THE CHARTER AN ACADEMIC SUCCESS?

IS THE CHARTER AN EFFECTIVE, VIABLE ORGANIZATION?

IS THE CHARTER FISCALLY SOUND?

IF THE SUNY TRUSTEES RENEW THE CHARTER, ARE THE EDUCATION CORPORATION’S PLANS FOR THE CHARTER REASONABLE, FEASIBLE, AND ACHIEVABLE?

This report contains appendices that provide additional statistical and organizationally related information including a statistical charter overview, copies of any school district comments on the Application for Charter Renewal, and the SUNY Fiscal Dashboard information for the charter. If applicable, the appendices also include additional information about the education corporation, its charters and student achievement of those charters.



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](#).

2. Version 5.0, May 2012, available on the [Institute’s website](#).



IS THE CHARTER AN ACADEMIC SUCCESS? THE INFORMATION BELOW HIGHLIGHTS THE INSTITUTE'S AND SUNY TRUSTEES' APPROACH TO ACCOUNTABILITY PLANS FOR EACH SUNY AUTHORIZED CHARTER.

At the beginning of the Accountability Period,³ the charter developed and adopted an Accountability Plan that set academic goals for performance in the key subjects of ELA and mathematics, as well as science and the federal Every Student Succeeds Act ("ESSA"). High school Accountability Plans also include goals for High School Graduation, College Preparation, and Social Studies. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. The Institute examines results for all required Accountability Plan measures to determine goal attainment. The Act requires charters be held "accountable for meeting measurable student achievement results"⁴ and states the educational programs at a charter school must "meet or exceed the student performance standards adopted by the board of regents"⁵ for other public schools. SUNY's required accountability measures rest on performance as measured by statewide 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 CHARTER DO AS COMPARED TO SCHOOLS IN THE DISTRICT AND SCHOOLS THAT SERVE SIMILAR POPULATIONS OF ECONOMICALLY DISADVANTAGED STUDENTS?

GROWTH PERFORMANCE, I.E., HOW MUCH DID THE CHARTER GROW STUDENT PERFORMANCE AS COMPARED TO THE GROWTH OF SIMILARLY SITUATED STUDENTS?

Absolute, comparative, and growth achievement provide a basis for triangulating charter performance within each academic goal area. Furthermore, every SUNY authorized charter school may propose additional, mission aligned goals and measures of success when crafting its Accountability Plan. The final Accountability Plan adopted by the education corporation's board and approved by the Institute is included in the charter and frames the analysis of the charter's student achievement results.

The Institute consistently emphasizes comparative and growth performance over absolute measures in its analysis of goal attainment. Nevertheless, the Institute analyzes every measure included in a charter's Accountability Plan to determine its level of academic success, including the extent to which each charter has established and maintained a record of high performance and demonstrated progress toward meeting its academic Accountability Plan goals throughout the charter term. Whether or not a charter includes additional measures in its Accountability Plan, the Institute considers all available evidence of charter performance at the time of renewal.

3. 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. For a charter in a subsequent charter term, the Accountability Period covers the final year of the previous charter term and ends with the school year prior to the final year of the current charter term. In this renewal report, the Institute uses "charter term" and "Accountability Period" interchangeably.

4. Education Law § 2850(2)(f).

5. Education Law § 2854(1)(d).

State assessment data in ELA, mathematics, and science in 3rd- 8th grade form the basis of data required to analyze the required accountability measures for elementary and middle schools. These data were not available in 2019-20 following the state’s cancellation of all state exams during the start of the COVID-19 pandemic. Although schools participated in state assessments in ELA and mathematics in 2020-21, the participation rates that year were inconsistent. The resulting data is not sufficiently reliable or credible for cogent analyses of charter academic performance. In response, the Institute provided all SUNY authorized charter schools a framework for the analysis of norm-referenced and internally developed exam data. To every extent possible, the Institute attempted to maintain a consistent framework of examining absolute, comparative, and growth performance. During 2019-20 and 2020-21, charters reported data on a variety of norm-referenced and internally developed assessments to demonstrate student academic success. This renewal report contemplates charter performance during the pandemic through the lenses of absolute and growth performance on norm-referenced and internally developed ELA, mathematics, and science assessments along with high school completion and college readiness data.



Charter Schools Institute
The State University of New York