SUNY Charter Schools Institute
The State University of New York

2024 TRANSMITTAL AND SUMMARY FORM

Please refer to the 2024 SUNY Request for Proposals document available at https://www.newyorkcharters.org/resource-center/applicants/ when completing this form. Contact charter.newapp@suny.edu with any questions.

Proposed School Information (note: if proposing multiple schools, a separate Transmittal is required for each one)			
Proposed Charter School Name: (Must include words "Charter" and "School")	South Bronx Classical Charter School V		
Education Corporation Name (if different than proposed charter school name):			
		Ed. Corp Status:	New Ed Corp
Proposed Opening Date (Month/Year):	08/2025	School District of Location (or NYC CSD):	District 8, 10, or 11

Proposed Grades to be Served and Enrollment		
Charter Year	**Grades**	**Enrollment**
Year 1	K-1	120
Year 2	K-2	180
Year 3	K-3	240
Year 4	K-4	300
Year 5	K-5	360

Proposed Affiliations (if applicable)	
Charter Management Organization ("CMO"):	N/A
CMO Contact Info (Name, Phone):	N/A
Partner Organization:	N/A
Partner Contact Info (Name, Phone):	N/A
NOTE: A CMO provides a majority of educational management services at a school, a partner organization is a non-profit entity that provides space or support to the school but is does not provide a majority of educational management services.	

Lead Applicant(s) Contact Information						
Lead Applicant Name:	Lester Long					
Applicant is a (check all that apply):	☐ Parent	☐ Teacher	☑ School Administrator	☐ District Resident	☐ SUNY Ed Corp/Charter School	
Organization Name (if applicable):	Classical Charter Schools					
Applicant Mailing Address:	[redacted]					
Phone Number (direct line):	[redacted]	Secondary Phone Number:		Email Address:	[redacted]	

Secondary Applicant Name (if applicable):	Francesca Emanuele				
Applicant is a (check all that apply):	☐ Parent	☐ Teacher	☑ School Administrator	☐ District Resident	☐ SUNY Ed Corp/Charter School
Organization Name (if applicable):	Classical Charter Schools				
Applicant Mailing Address:	[redacted]				
Phone Number (direct line):	[redacted]	Secondary Phone Number:		Email Address:	[redacted]

Media/ Public Contact Information (Note: this information will be publicly posted on the Institute's website)					
Name:	Lester Long	Phone #:	718-860-4340	Email:	llong@classicalcharterschools.org

Program Design

Provide the proposed school's mission statement in the space below. **(Maximum 200 words.)**

South Bronx Classical Charter School V will prepare K-8th grade students in the South Bronx to excel in college-preparatory high schools. Through a classical curriculum and highly-structured setting, students become liberated scholars and citizens of impeccable character who achieve proficiency in and advanced mastery of New York State Performance Standards.

Provide the proposed school's key design elements. Provide a brief **(up to 50 words)** description of each key design element.

SBCCS V will promote a Classical curriculum and structured daily schedule for students. In addition to a focus on the fundamentals of reading, writing, and math, the school will offer character education to all its scholars, Latin starting in third grade, and Debate starting in fourth grade. Finally, consistent with a liberal arts education, the school seeks to ensure that scholars graduate with a diverse array of skills and appreciation in Art, Music, and Fitness, receiving at least two periods of each during each week. Lastly, the curriculum includes intensive Science and Social Studies programs from Kindergarten through 8th grade.

SBCCS V's instructional leadership will include the Executive Director, School Director, and the Director of Curriculum & Instruction. Each grade will have a Grade Team Leader, who will be in charge of curricular refinement, observing and improving teachers in his or her grade, holding grade team meetings, and reporting to the School Director. This system provides organizational stability and a leadership pipeline for teachers to become Instructional Coaches, Deans of Students, and School Directors over time.

Classical Framework: Within a classical framework, SBCCS V will provide an educational program firmly based on two principles:
(1) All children can achieve academic success when given a rigorous and organized curriculum, effective teaching, and a structured environment;
(2) Development of respectful, compassionate, productive citizens is a fundamental aim of education.

Rigorous and Organized Curriculum: Scholars can achieve academically through a demanding, research-based, field-tested curriculum. Our curriculum focuses on language development - a critical need of our target population. All scholars benefit from 3 hours of daily literacy instruction and 2 hours of daily math instruction, in addition to other courses such as Latin and Debate.

Effective Teaching: SBCCS V will recruit teachers primarily from its ClassiCorps Fellowship program. Teacher development is prioritized, with our teachers receiving 100+ hours of Professional Development annually. To attract and retain the strongest teachers, salaries will be 5% to 10% higher than those of teachers in NYC's Extended Time Schools.

Structured Environment: Within a disciplined environment, teachers can teach, and all scholars can learn. SBCCS V will create positive student behavior through modeling, explicit behavioral instruction, and a transparent set of expectations shared with families. Our Code of Conduct includes recognition of the school s core values and clear consequences for infractions.

Development of Respectful, Compassionate, and Productive Citizens: We believe that the development of respectful, compassionate, and productive citizens is a fundamental purpose of education. All scholars will have 45 minutes of character education per week. As scholars acclimate to our culture of positive behavior and character, less direct instruction and teacher intervention will be required.

Family Engagement: All families will receive regular communication regarding their scholars academic and behavioral progress, using grades and test scores as benchmarks for discussion. Importantly, we will have a Family Advisory Council ("FAC") which will serve as a liaison between parents and administration.

Provide a brief overview of the proposed school's academic program in the space below. The description should address any specific philosophical, instructional, curricular, or other approaches the school intends to implement and the rationale for this selection. **(Maximum 500 words.)**

SBCCS V intends to use and refine curricula developed by Classical Charter Schools ("CCS"). As the mission and design of SBCCS V will match those of CCS, by extension the curricula will also be consistent. In all grades and subjects, the CCS curriculum is fully aligned with the New York State standards. Our strong results are due, in large part, to this alignment and the quality of our curriculum.

We believe that a teacher's execution of the curriculum, the assessment of scholars understanding of the standards and the subsequent data that come from the assessments, and the culture of analysis that helps inform improvement of the curriculum and teacher execution, make up our instructional cycle. Our instructional leadership team (including a Director of Curriculum and Instruction, Curriculum Manager, and a team of Instructional Coaches) is focused on ensuring that this instructional cycle is executed thoughtfully and faithfully each day.

From its founding, CCS designed a school model that we believe best meets the needs of our target population, and which is embedded within the guiding framework of a classical education. The key components of a classical education in the early years focus on a core curriculum, the development of strong literacy and numeracy skills, knowledge, and understanding of elementary facts. In all grades, students develop core knowledge in the basic subjects of reading, writing, math, science, and history.

Scholars enjoy approximately 100 minutes a day of math instruction including a core math lesson and extension blocks to cover foundational concepts or push higher-level thinking; these include Reteach, Number Routines, and Number Stories. Over three hours a day is dedicated to literacy instruction including phonics (K-1), grammar (2-8), writing (K-8), read aloud (K-4), reading (5-8), guided reading (K-6), close reading (K-6), and textual analysis (3-8). Grade teams are responsible for thoughtfully preparing lessons and considering differentiation techniques that meet each scholar's individual learning needs.

In addition to our core math and ELA blocks, scholars receive Science and Social Studies instruction, as well as Latin, starting in 3rd grade. Scholars continue their study of Latin through 8th grade. In 4th grade, scholars begin debate, a block that develops both critical thinking and public speaking skills and continues through 8th grade.

Most curriculum is scripted and our lesson plans, which were created in-house by teachers, are incredibly detailed. Plans exactly what objectives will be taught, how they should be taught, and the time allotted for each section of the lesson. The plans include instructional and engagement strategies that can be used, as well, which is particularly useful to new teachers. Teachers collaborate each day on execution in their daily stand-up meetings and receive instructional support on their execution on an at least weekly basis from their instructional coach. Teams meet to analyze data for each major assessment and plan actionable next steps to improve instruction. This collaboration and support help to ensure that scholars in each classroom are receiving the same excellent education and that ideas are shared immediately across all classrooms at each grade level.

Proposed Board Members

Provide a list of all proposed board members below. The Institute understands that applicants may add trustees to the education corporation's board in the future but expects applicants to have at least five board members at the time of application submission and identify a Chair, Vice-Chair, Secretary, and Treasurer. All proposed board members must undergo background checks and be present at an interview to constitute a functioning board in order for the Institute to recommend the charter for approval.

For each proposed trustee please provide a brief biographical statement **(maximum of 200 words each)** that includes each proposed trustee's:

- Name;
- Proposed charter school board title, if applicable (e.g., Chair, Vice-Chair);
- Current job title/position and company/organization;
- Past job title(s)/position(s) and company/organization (if applicable);
- Educational background including degree(s) earned and institution(s); and,
- Any relevant experience including boards, volunteering, community organizations, etc.

I. Jake Elghanayan, Chair

Jake Elghanayan began his career practicing law as an associate at Sullivan & Cromwell LLP. He received his B.A. from Brown University in 2006 and a joint M.A.-J.D. from Johns Hopkins University School for Advanced International Study and NYU School of Law in 2012. Mr. Elghanayan is a principal of TF Cornerstone, a New York City-based real estate development firm.

II. James R. Maher, Jr., Vice Chair

James Maher is a Principal at Harbor Road Holdings, a real estate investment firm. Prior to Harbor Road, Mr. Maher served as a Director in the Real Estate Equity team in New York City. He earned his B.A. from Brown University and an M.S. in Real Estate Finance from NYU. He also serves on the board of Family Dynamics, which provides community-based services including family counseling, after-school programs, and workforce preparedness courses in Bedford-Stuyvesant, Brownsville, and East New York, Brooklyn. Mr. Maher is also a member of the Advisory Counsel for Prep for Prep.

III. Veena Malpani, Secretary

Veena Malpani brings over 15 years of legal practice to Classical and is currently the Regulatory Compliance Counsel & Compliance Officer in the New York office of Marshall Wace, an international asset management firm. Ms. Malpani graduated from American University, Washington College of Law, and from Emory University.

IV. Mariel Jenkins, Treasurer

Mariel Jenkins brings over 10 years of financial experience to Classical. She is currently the Executive Director of Securitized Products Lending at Morgan Stanley. Prior to that, she held positions at BlackRock and UBS. Ms. Jenkins is a graduate of Harvard University.

V. Kathryn Moore Heleniak, Trustee

Kathryn Heleniak is an author and professor of Art History at Fordham University. She was a residential fellow at the Ligurian Center for Arts and Humanities and a recipient of a Mellon Fellowship at the Yale Center for British Art. Dr. Heleniak was named an Outstanding Teacher in the Humanities at Fordham University.

VI. C. Stephen Baldwin, Esq., Trustee

Stephen Baldwin, currently a writer, has served as a population and development educator with the United Nations, Population Council, and Ford Foundation. Previously, Mr. Baldwin was an attorney at the United Nations, an Executive Director of the Learning Disabilities Association of NYC, a third-grade teacher in the South Bronx, and an independent arbitrator/mediator.

VII. Kevin Murphy, Trustee

Kevin Murphy retired from P.S. 96 in East Harlem where he taught Math across the elementary grades as a cluster teacher for a dozen years. Previously, Mr. Murphy was an agent with Northwestern Mutual Life Insurance Company and a Vice President at Morgan Guaranty Trust Company of New York.

VIII. Hon. Robert E. Torres, Trustee

Judge Torres is a Justice on the New York Supreme Court and a former Administrative Judge of Bronx County. He previously served as a judge in Family Court, Bronx County, and a judge of both Civil and Criminal Court in the City of New York. Mr. Torres graduated from the John Jay College of Criminal Justice and is a long-time Bronx resident.

Lead Applicant Signature	
Signature:	[redacted]

By signing this Proposal Transmittal Form, the Lead Applicant certifies that the information contained in this proposal to establish a charter school pursuant to the New York Charter Schools Act with the State University of New York Board of Trustees is true and accurate to the best of his or her knowledge.

NOTE: The Institute only accepts valid digital signatures or physically signed scanned copies. Please do NOT submit typed signatures. Please contact the Institute directly if you have questions

R-00b – Statistical Overview

Enrollment

Bedscode	Network/Ed Corp	School Name	School Year	Total Enrollment[1]	Number of Students with Disabilities[2]	Number of English language learners[3]	Number of Economically Disadvantaged Students
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2020-21	504	112	112	444
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2021-22	497	106	131	437
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2022-23	479	90	156	400
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2020-21	347	64	60	305
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2021-22	284	49	59	250
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2022-23	223	40	58	187
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2020-21	463	86	96	407
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2021-22	458	96	132	403
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2022-23	473	95	166	402
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2020-21	191	36	40	168
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2021-22	274	49	62	241
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2022-23	338	61	89	273

Retention

Bedscode	Network/Ed Corp	School Name	School Year	Total Number of Students Eligible to Return from Previous Year[1]	Total Number of Eligible Students Who Returned from Previous Year	Number of Students with Disabilities Eligible to Return from Previous Year[2]	Number of Students with Disabilities Who Returned from Previous Year	Number of English language learners Eligible to Return from Previous Year[3]	Number of English language learners Who Returned from Previous Year	Number of Economically Disadvantaged Students Eligible to Return from Previous Year	Number of Economically Disadvantaged Students Who Returned from Previous Year
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2020-21	450	390	94	83	89	89	396	343
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2021-22	477	380	109	80	112	110	420	334
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2022-23	465	357	101	78	131	110	372	285
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2020-21	339	295	63	50	57	57	298	260
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2021-22	344	250	64	41	60	54	303	220
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2022-23	270	214	48	36	59	45	216	171
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2020-21	337	316	63	60	74	74	297	278
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2021-22	463	353	86	73	96	95	407	311
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2022-23	458	367	96	76	132	101	366	294
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2020-21	132	112	23	19	33	33	116	99
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2021-22	191	147	36	22	40	40	168	129
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2022-23	274	153	49	21	62	43	219	122

Discipline

Bedscode	Network/Ed Corp	School Name	School Year	Number of In-School Suspensions (Occurrences)	Number of In-School Suspensions (unique students)	Number of Out of School Suspensions (Occurrences)	Number of Out of School Suspensions (unique students)	Number of Expulsions
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2020-21	20	14	45	27	0
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2021-22	127	72	170	75	0
321200860898	Classical Charter Schools	South Bronx Classical Charter School	2022-23	178	88	235	102	0
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2020-21	2	2	15	8	0
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2021-22	21	18	34	18	0
320700861035	Classical Charter Schools	South Bronx Classical Charter School II	2022-23	119	66	65	30	0
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2020-21	4	4	21	16	0
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2021-22	136	71	208	65	0
320900861084	Classical Charter Schools	South Bronx Classical Charter School III	2022-23	171	79	140	69	0
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2020-21	0	0	20	5	0
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2021-22	0	0	45	14	0
320900861122	Classical Charter Schools	South Bronx Classical Charter School IV	2022-23	21	16	53	22	0

R-01ac – Community Need and Proposed School Impact

a. Community Description and Need

Provide a narrative analysis of the community and target population for the school including:

- The applicant's rationale for selecting the community, including known or anticipated ties between the community and the founding group;
- Provide evidence demonstrating that the proposed school would provide an educational program aligning with the goals and needs of the community. (In other words, explain why this school and why this place?);
- A description of the community from which the proposed school intends to draw students. Applicants should consider the "community" as those areas from which the school intends to recruit a majority of its students, which may or may not be the school district (or in New York City, the CSD) of location alone;
- A description of community demographics, including the demographic statistics of the student populations (e.g. race/ethnicity, poverty, students with disabilities and English language learners ("ELLs"), as well as an analysis of demographic trends. Applicants may find some of this information at NYSED's Data Site, and may include other current, reliable sources;
- Performance of local schools in meeting the community's needs, including discussion of the strengths and weaknesses of the public and nonpublic school options in the intended community of location;
- How the proposed school would provide a needed alternative for the community, including discussion of any existing charter schools in the area and how the proposed school's program is different and would provide greater educational benefit to students who would attend the proposed school; and,

SBCCS V proposes to serve the student population in the South Bronx, particularly in the Soundview, Parkchester, Castle Hill, Hunts Point, and surrounding neighborhoods. Bronx County is the 3rd most densely populated county in the United States (out of 3,300). Of all counties east of Texas, Bronx County has the 2nd highest proportion of Hispanics, 2nd lowest proportion of non-Hispanic whites, and the highest rate of persons who self-identified as "some other race" or "multiracial". Bronx County is one of five counties nationwide with over 30% of households headed by single women (three of the remaining four are Indian reservations). Bronx County has the highest poverty, child poverty, murder, rape, and robbery rates in New York State, as well as the highest pediatric asthma rate in New York. Approximately 98% of South Bronx residents are African-American, Caribbean-American, or Hispanic.

We seek to work in this community by opening a high-performing K-8 school as part of a comprehensive and coordinated effort to assist families in need in the community.

Congressional District 14: The school is proposed to be located in Congressional District 14, which covers much of the South Bronx and Queens and has one of the nation's highest poverty rates and the lowest rate of "well off" households (defined as having incomes 500% of the poverty rate).

Community School Districts (CSDs): The school is proposed to be housed in Districts 8, 10, or 11. These three districts have been toward the bottom five of New York City's 32 districts based on ELA test scores for many years. Approximately 16% of students here are designated as English Language Learners and 25% of the students receive Special Education services.

It is within those two areas (Special Education and English language instruction) that the SBCCS V team is most excited to serve with its opening. We believe that most educational theories and best practices initially develop

within those two areas, and such advances may be effectively brought into general education settings. With a developed curriculum built from the experience and reflection of dedicated educators, we can continue to make inroads into serving those most at-risk of academic failure. Indeed, one of SBCCS V's most important features will be its unique At-Risk Program, which applies Response to Intervention concepts specifically to literacy instruction. The school's inclusive system of maximizing achievement of special education students and English language learners is relatively rare within these communities. We hope that a strong education program for all scholars will reduce the incidence of special education and ELL referrals and the severity of the challenges those scholars face.

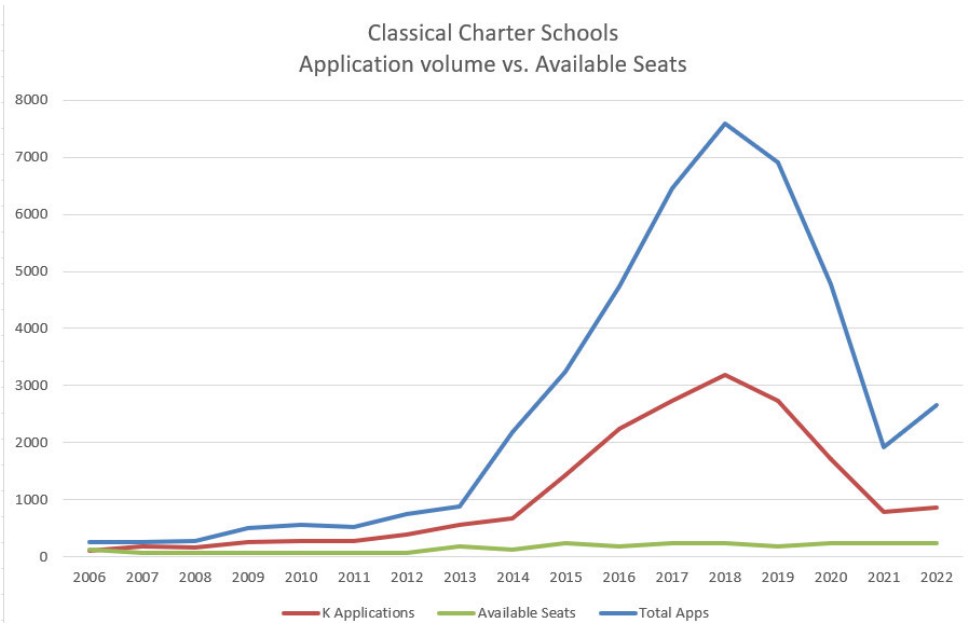
The proposed location of SBCCS V was chosen due to the Lead Applicant's desire to find the highest-need location in NYC, as well as his desire to capitalize on the benefit of the Board's specific knowledge of and experience with its educational system.

Below is a snapshot of the ELA and Math pass rates of four schools located near a potential location for our SBCCS V building in District 8. This signals a need for higher performing schools that will best support students' academic growth and preparation for high school and beyond.

SCHOOL	ELA PASS RATE	MATH PASS RATE
ANTONIA PANTOJA PREPARATORY ACADEMY	36.2	24.7
P.S. 138 SAMUEL RANDALL	32.4	33.6
P.S. 100 ISAAC CLASON	22.8	25.6
SOUNDVIEW ACADEMY FOR CULTURE AND SCHOLARSHIP	20.1	8.9

The opening of SBCCS V will enhance educational options in the Bronx by providing a Blue-Ribbon Award-winning curriculum, teaching methods, and results. Furthermore, few schools in the community offer an embedded Character Education program and multiple Art, Music, and Fitness lessons per week. SBCCS V offers a deep sense of safety, support, and success to not just our scholars, but also to their families. Lastly, we are aware of no school (public, private, or charter) which offers Latin starting in the third grade, or Debate starting in fourth grade.

Family and community support for SBCCS V is evidenced through community interaction with the four existing Classical Charter Schools that SBCCS V will share its curriculum and model with. This includes a deep waitlist of parent applicants, a positive working relationship with currently three co-located public schools, and annual discussions with elected officials. As evidence of strong and growing family support, in 2017, its first year, SBCCS IV alone received 568 kindergarten applications, while in 2018, its second year, it received 756 kindergarten applications, a 33% increase. The chart below shows Classical's overall kindergarten application volume, versus available seat. In sum, there are about 3,000 families who applied for their Kindergartener to attend a Classical school and were not able to attend. Despite a citywide dip in lottery applications for charter schools, parent interest remains strong and rising.



Community support can also be assessed through the context of strong relationships with the co-located schools for SBCCS I and SBCCS II. In both cases, CCS enjoyed a strong, positive relationship. We are proud to state that at several public hearings, collocated principals were the only attendees and spoke positively about us, even when such meetings were about increasing our footprint in the building. CCS continues to work with local elected officials, who have lent support over past years. Over the past 5 years, we have hosted our local Assemblyman, State Senator, and Bronx Borough President.

If the opportunity arises, SBCCS V leadership would like to offer complimentary support and instructional guidance to neighboring schools. One way would be to welcome faculty in neighboring schools to join our monthly Professional Development sessions. This initiative is one that SBCCS V is passionate about pursuing, as it has the potential to positively impact students in neighboring schools.

b. Programmatic Impact

The Act requires applicants to provide an assessment of the projected programmatic impact the proposed charter school would have on existing public and nonpublic schools in the same geographic area as the proposed school location. Responses should include:

- A table listing the existing educational options and grades served available to the target population including all district, charter, and private schools in the geographic area, including whether these schools have open enrollment options for students and if so at which grade levels;
- Information demonstrating a thorough analysis of existing educational options for the community and target population that considers ongoing demographic changes and trends and attempts to project their impact on enrollment at nearby public and nonpublic schools;
- Analysis of how the proposed school's enrollment plan would impact the academic programs, enrollment, and overall viability of the public and non-public schools; and,
- If proposing to replicate and add a school to an existing education corporation, also discuss the programmatic impact on the existing school(s) within the education corporation including if the new school would facilitate or necessitate changes to the existing school(s)' academic program, enrollment, or overall viability

The table below shows the charter school enrollment among charter schools in District 8.

DISTRICT 8 CHARTER SCHOOLS	Grades Served	Enrollment 2023	23-24 Open Enrollment
Bold Charter School	K-6 will expand to K-12	328	Y, all grades
Bronx Arts and Science Charter School	K-5	341	Y, all grades
Bronx Charter School for the Arts	K-8	594	Y, all grades
Emblaze Academy Charter School	5-8	184	Y, all grades
Girls Preparatory Charter School of the Bronx	K-10 will expand to K-11	307	Y, all grades
Grand Concourse Academy Charter School	K-8	699	N
Icahn Charter School 7	K-8	330	N
Leaders in Our Neighborhood Charter School	K-12	979	Y, all grades
New Visions Charter HS for Math and Science II	9-12	497	Y, all grades
New Visions Charter HS for the Humanities II	9-12	395	Y, all grades
South Bronx Early College Academy Charter School	6-8	304	Y, all grades
Success Academy Charter School - Bronx 4	K-5	618	N
Success Academy Charter School-Bronx 3	K-4	1316	N
Urban Dove Team Charter School II	10-12	294	Y, all grades
TOTAL CHARTER ENROLLMENT DISTRICT 8		**7186**	

As SBCCS V intends on enrolling most of its students in kindergarten, we have included the table below:

NYC GEOG DIST # 8 - BRONX

Year	Total Enrollment	K - District	K - Charter	Total K Enrollment	Percent Charter K Enrollment
2012	30760	2274	[redacted]	[redacted]	7.7%
2013	29551	2266	[redacted]	[redacted]	8.4%
2014	28576	2219	[redacted]	[redacted]	12.3%
2015	28259	2335	[redacted]	[redacted]	15.2%
2016	27991	2191	[redacted]	[redacted]	18.0%
2017	27451	2020	[redacted]	[redacted]	18.9%
2018	26883	1964	[redacted]	[redacted]	18.4%
2019	26347	1853	[redacted]	[redacted]	21.5%
2020	25749	1800	[redacted]	[redacted]	26.9%
2021	24222	1534	[redacted]	[redacted]	28.1%
2022	22777	1485	[redacted]	[redacted]	27.0%
2023	22227	1501	[redacted]	[redacted]	27.8%

SBCCS V will positively impact the scholars, teachers, local community, and schools within the area by supplying a superior education to an at-risk community. Our school provides structure, a rigorous and well-developed academic curriculum, as well as a curriculum focused on character development, which is not common at other schools. We offer an extended school year and extended school day with dismissal at 4:30, which might also be appealing to families.

The opening of SBCCS V will not necessitate any changes to the existing Classical Charter Schools in terms of their academic program, enrollment, or overall viability. SBCCS V will not be a part of the CCS education corporation.

c. Fiscal Impact

The Act requires an applicant to provide "an assessment of the projected programmatic and fiscal impact of the school on other public and nonpublic schools in the area." Complete the fiscal impact table in the budget template (found in the Applicant Resource Center of the Institute's website) and include a copy with this response. Discuss the fiscal impact of the school on other public and non-public schools in the area including:

- **Enrollment expectations;**
- **Per Pupil Allocation assumptions using the most recent school per pupil aid, available on NYSED's website;**
- **Dollar amounts the proposed school anticipates receiving from each anticipated sending district in per pupil funding;**
- **Other projected revenue the proposed school anticipates receiving from the district (special education, grants, etc.);**
- **Projected budget for the school district of location (please note the source and year for this figure); and,**

15 NY Education Law SS 2851(2)(q) DRAFT FOR COMMENT APPLICATION REQUESTS Questions? Email: [redacted] SUNY Request for Proposals (2024) 21

- **Yearly projected impact as a percentage of each sending district's budget (for districts projected to send at least ten students).**

Largest Enrollment District: New York City Department of Education							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for New York City Department of Education School District	Projected Impact (% of District's Total Budget)
Year 1 (2024-25)	124	18,707	2,319,643	-	2,319,643	37,500,000,000	0.006%
Year 2 (2025-26)	186	19,081	3,549,054	-	3,549,054	37,500,000,000	0.009%
Year 3 (2026-27)	248	19,463	4,826,714	-	4,826,714	37,500,000,000	0.013%
Year 4 (2027-28)	310	19,852	6,154,060	-	6,154,060	37,500,000,000	0.016%
Year 5 (2028-29)	372	20,249	7,532,569	-	7,532,569	37,500,000,000	0.020%

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	According to the NYC DOE, the 2023-2024 total budget is $37.5 billion. Of that, NYC provides 53%, NY State provides 37%, The Federal government and other sources provide 10%. https://www.schools.nyc.gov/about-us/funding/funding-our-schools

Our analysis of fiscal impact assumes a Per Pupil funding amount of $18,707, gotten from the NYSED website. The table below provides the amounts of funding anticipated by the proposed school. As noted below, the fiscal impact to the sending district's budget is very low, at less than 0.02%. We do expect to receive additional funding for our special education program, which we expect to total less than $900,000 per year.

To create a strong school culture in a gradual and deliberate manner, SBCCS V will open with 62 scholars in kindergarten and 62 scholars in first grade (three classes of 20-21 students each, per grade). If a facility of sufficient size becomes available, in the spirit of educational urgency the school would welcome opening with a second grade as well. SBCCS V will not enroll students after fifth grade unless fiscal difficulties require it. At full grade capacity during the charter term, and assuming no attrition, the school will serve a maximum of 372 students; should the school be re-chartered and expand to grade 8, and again assuming no attrition, the school would serve a maximum of 558 students. The chart below reflects a 0% annual attrition rate.

PROJECTED ENROLLMENT TABLE OVER THE CHARTER TERM						
Year	Ages	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
K	4-5	62	62	62	62	62
1st	5-6	62	62	62	62	62
2nd	6-7		62	62	62	62
3rd	7-8			62	62	62
4th	8-9				62	62
5th	9-10					62
6th	10-11					
7th	11-12					
8th	12-13					
Total:		124	186	248	310	372

Our proposed opening district is one of the districts in the Bronx. Below are the estimated annual budgets for SBCCS V per year as well as estimated impact:

School Year	Charter Year	Est. Budget	DOE Annual Budget*	Impact
2025-2026	1	$2,297,133	27,600,000,000	0.008%
2026-2027	2	2,749,200	27,600,000,000	0.010%
2027-2028	3	3,353,999	27,600,000,000	0.012%

2028-2029	4	3,939,668	27,600,000,000	0.014%
2029-2030	5	4,466,884	27,600,000,000	0.016%
* Based on the 2021-22 budget.				

NOTE: Submit the narrative response to Request 1 as a Microsoft Word® file named: R-01ac - Community Need and Proposed School Impact.

R-02ab – Addressing Need

a. Mission

South Bronx Classical Charter School V prepares K-8th grade students in the South Bronx to excel in college-preparatory high schools. Through a classical curriculum and highly-structured setting, students become liberated scholars and citizens of impeccable character who achieve proficiency in and advanced mastery of New York State Performance Standards.

b. Key Design Elements

Provide a clear and concise overview of the proposed school's key design elements, which are the most important, non-negotiable aspects of the school critical to its success. This may include elements such as a specific subject focus or theme (e.g. the arts, environmental science, social justice, etc.), specific targeted student population the school would serve (e.g. students with autism, multi-language learners, overage and under-credited students, etc.), specific programs (e.g. career and technical education, International Baccalaureate, etc.), unique staffing models, schedules, assessment systems, and so forth. In addition to a list of the proposed key design elements, please include:

- an analysis of any research, evidence of effectiveness, or examples of existing programs that support the selection of these key design elements with appropriate citations;
- discussion of how the school will determine if it is effectively executing its key design elements in a way that is aligned with its mission; and
- discussion of how the key design elements address the specific needs identified in Request 1. If the key design elements for the proposed school differ from those submitted to the Institute as part of the most recent application, or application for renewal, of an education corporation or one of its schools, please describe why any element changed.

NOTE: This response should not exceed five pages in length, and the key design elements discussed should match those included in the Transmittal and Summary Form. What to Submit: Submit the narrative response, not exceeding five pages in length, to Request 2(a-b) as a Microsoft Word® file named: R-02ab - Addressing Need.

While SBCCS V will not be part of the CCS education corporation, it will duplicate the model of the four existing CCS schools: South Bronx Classical Charter School ("SBCCS"), South Bronx Classical Charter School II ("SBCCS II"), South Bronx Classical Charter School III ("SBCCS III") and South Bronx Classical Charter School IV ("SBCCS IV"). In addition to a focus on the fundamentals of reading, writing, and math, the school offers character education to all its scholars, Latin starting in third grade, and Debate starting in fourth grade. Finally, consistent with a liberal arts education, the school seeks to ensure that scholars graduate with a diverse array of skills and appreciation in Art, Music, and Fitness, receiving at least two periods of each subject weekly.

Similar to the other CCS schools, the school's instructional leadership will include the Executive Director, School Director, and the Director of Curriculum and Instruction. Each grade will have a Grade Team Leader, who will oversee team logistics, curricular refinement, observations and development of teachers in his/her grade, and grade team meetings covering data analysis and instructional best practices. The Grade Team Leader reports to the School Director and works closely with Instructional Coaches to develop their team. Additionally, each school site has a Scholar Services Team Manager to coordinate logistics among each school-based Scholar Services team and to maintain close partnership with the network's Director of Scholar Services. Classical also promotes Specials Managers to manage each school site's Specials team (Art, Music, Fitness) and Subject Team Leaders (specialists in these three areas) to elevate instructional best practices for these blocks across the network. This system provides organizational stability and a leadership pipeline for teachers to become Instructional Coaches, Deans, School Leadership Fellows and School Directors thereafter.

INSTRUCTIONAL METHODS AND PHILOSOPHY/PRINCIPLES OF PRACTICE

Classical Framework: We strongly believe that our school model best meets the needs of all students in our target population. The key components of a classical education in the early years focus on a core curriculum, development of strong literacy and numeracy skills, knowledge, and understanding of elementary facts, with less emphasis on "higher level" thinking, until the later grades. In all grades, our scholars develop core knowledge and skills in the basic subjects of reading, writing, math, science, and history. Subjects are taught directly and sequentially, as clearly elucidated in the Common Core Learning Standards, so scholars can master skills and content each step of the way. Within this classical framework, SBCCS V will provide an educational program firmly based on two principles:

- All children can achieve academic success when given a rigorous and organized curriculum, effective teaching, and a structured environment.
- Development of respectful, compassionate, productive citizens is a fundamental aim of education.

Rigorous and Organized Curriculum: We believe that an organized, clear, and sequential curriculum, fully aligned with the Common Core and New York State Learning Standards, focused on ensuring strong literacy skills in all students, will best serve the educational needs of our target population. Reading will be the most important part of an SBCCS V education. Within a framework of classical education that focuses relentlessly on language development – a critical need of our target population – all scholars will benefit from three (3) hours of daily literacy instruction and two (2) hours of daily math instruction. Consistent with the school's mission and with the tenets of a classical education, our scholars will be given 45 minutes of character education instruction per week.

Ultimately, we believe scholars can achieve academically through a demanding, research-based, field-tested curriculum and a highly structured, detail-oriented, and supportive culture.

Effective Teaching: The recruitment, development, and retention of effective teachers is critical to high scholar achievement. Effective teachers manage their classroom, know their content, develop skills sequentially over time, use data strategically to inform their instruction, and do whatever it takes to maximize impact. There is no single "recruiting season," and developing successful connections to specific candidates requires a continuous effort and targeted approach. SBCCS V will recruit teachers primarily from its ClassiCorps Fellowship, a three-year program that recruits, develops, and promotes teachers. Additionally, SBCCS V will recruit teachers from strategic website postings, professional job fairs, and outreach to selective schools, businesses and industries. Similarly, teacher development is a continuous process. Through summer orientation, weekly grade team meetings, monthly school-wide meetings, and ongoing individual sessions, our teachers will benefit from over 100 hours of Professional Development annually. To attract and retain the strongest teachers, salaries will be 5% to 10% higher than those of teachers in New York City's Extended Time Schools.

Structured Environment: Within a disciplined environment, teachers can teach, and all scholars can learn. SBCCS V will create positive student behavior through modeling, explicit behavioral instruction, and a transparent set of expectations shared with families at orientations and throughout the year. These rules, detailed in the Code of Conduct, include recognition of the school's core values and clear consequences for infractions.

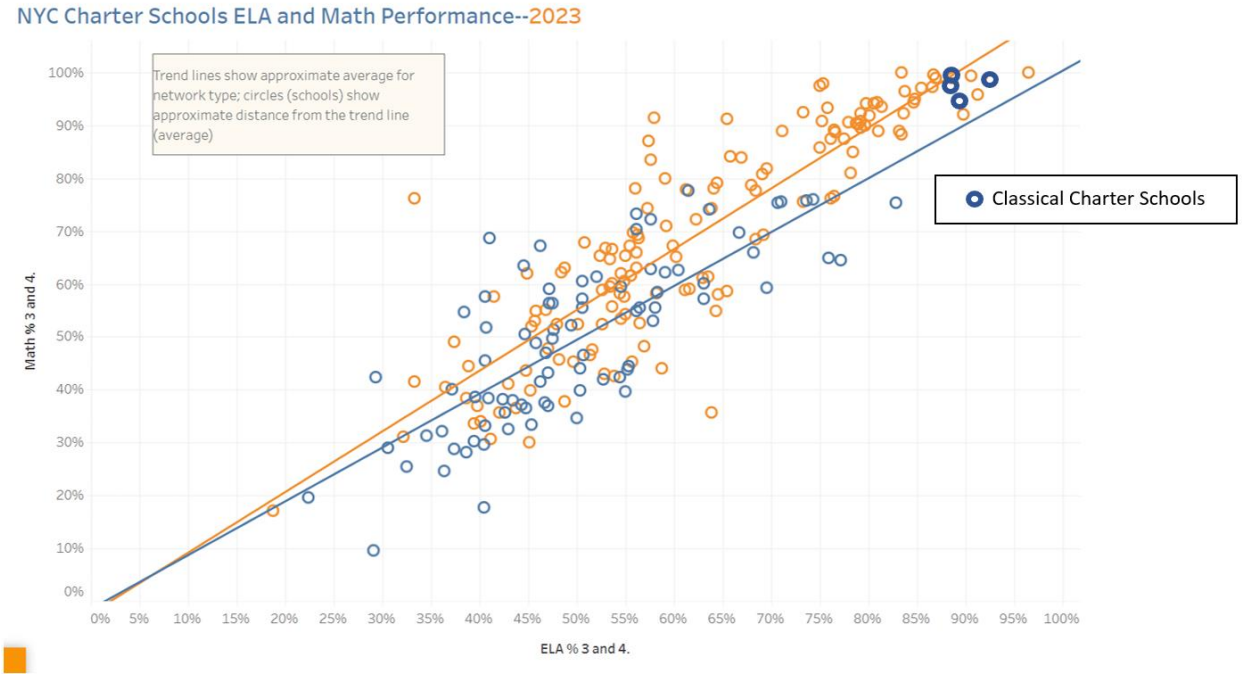
Development of Respectful, Compassionate, and Productive Citizens: We believe that the development of respectful, compassionate, and productive citizens is a fundamental purpose of education. This is fully consistent with the ideals of classical education. All scholars will receive 45 minutes of weekly character education per week, taught by our Deans of Students. As scholars acclimate to our culture of positive behavior and character, less direct instruction and teacher intervention will be required.

Family Engagement: For young children to succeed academically, schools and parents must develop positive and communicative relationships. All Classical families will receive regular communication regarding their scholars' academic and behavioral progress, using grades and test scores as benchmarks for discussion. Additionally, grade teams and staff across our network plan and host family events and workshops, generally at least once per trimester. Importantly, we establish a Family Advisory Council ("FAC") which will serve as a liaison between parents and administration.

EVIDENCE OF SUCCESS

SBCCS V will closely resemble the CCS model and will adopt the same research-backed curriculum that was developed by CCS instructional leaders. CCS has demonstrated a record of academic achievement and progress through its distinct school model and curriculum, which will be replicated in SBCCS V.

Ranked by pass-rate above its Community School District, the New York City Charter School Center ranks Classical Charter Schools amongst the highest performing charter networks in New York City. More specifically, our schools ranked #2 (SBC III), #6 (SBC IV), #7 (SBC I), and #8 (SBC II) in NYC Charter School ELA and Math Performance in 2023. As a network, Classical Charter Schools had the highest pass rates of all NYC charter networks in 2021, 2022, and 2023.



The following chart summarizes CCS's success, including a comparison to other NYC charter schools:

	ELA		MATH	
	2023	2022	2023	2022
Classical Charter Schools	**90%**	**88%**	**98%**	**90%**
Success Academies	80%	76%	92%	83%
Achievement First	53%	51%	59%	41%
Icahn Charter Schools	84%	77%	92%	79%
Ascend	60%	55%	59%	49%
KIPP	55%	51%	69%	49%
Uncommon Schools	54%	53%	63%	40%
Public Prep	48%	49%	46%	33%
Democracy Prep	49%	49%	43%	21%
Explore Schools	49%	46%	58%	32%
Zeta Charter Schools	76%	63%	87%	69%
Village Academies	75%	58%	87%	52%
Brooklyn Prospect	76%	70%	78%	58%
Excellence Community	71%	65%	86%	64%

Classical is also among New York State's most fiscally strong non-CMO charter schools, receiving clean audit letters for the past 15 years.

EVIDENCE OF REFLECTION

School leadership elicits feedback from faculty through annual staff surveys to ensure that our key design elements are helping to achieve our mission. Additionally, all teachers and instructional staff are welcome to contribute to tri-annual curricular audits in which staff reflect on the clarity, rigor, and effectiveness of our curriculum. In our curricular audit, DEI-focused reflections are also collected to ensure we are making advancements to our units, texts and topics that are more culturally responsive and relevant.

R-03ad – Proposal History

a. Applicant Information

Indicate whether the applicant is a parent, teacher, administrator, and/or community resident as required by the Act or, if a board chair of an existing SUNY-authorized education corporation, indicate "Education Corp./Charter School." Provide a brief biographical description for the applicant(s) including relevant background experience and educational background. Provide a description of the applicant's knowledge of and relationship to the community in which the proposed school would be located.

Notes:

- The Institute requests that proposals identify no more than 1-2 persons as lead applicants.
- As noted above, the lead applicant(s) and proposed board officers must undergo fingerprinting and criminal background check as part of the application review process.

The lead applicant for South Bronx Classical Charter School V is Lester Long, a school administrator and the founder of the existing, Regents-charted, Classical Charter Schools network. Mr. Long graduated from Dartmouth College in 1993, majoring in Economics with a concentration in Government. He launched his career in investment banking before transitioning into a career in education through the New York City Teaching Fellows program.

While earning his Master's in Elementary Education from Hunter College at night, Mr. Long taught elementary literacy, mathematics, music, and physical education to general and special education students of all grades.

Mr. Long set a vision to make a greater impact on students' educational trajectories in the South Bronx and, in 2006, founded South Bronx Classical Charter School I. Since then, he has opened 3 other schools in the network, serving K-8th grade students and providing them with a rigorous, high-quality education to better prepare them for college preparatory high schools. Three of the four existing CCS schools are recipients of the National Blue-Ribbon award.

b. Proposal History

Describe the genesis of the proposal, how the applicant team formed, and the relationship of its members to each other. Clearly describe the process that the founding group used to develop the proposal. Discuss any assistance the founding group received from outside advisors (e.g., support organizations or consultants), even if these outside advisors are not active members of the founding group. If the proposed school is similar to or a replication of an existing school inside or outside of New York State, the response should address how the founding group made the decision to replicate the school and address any changes proposed from the original school model.

Lester Long, founder and Executive Director of Classical Charter Schools, is seeking a new charter with SUNY to open South Bronx Classical Charter School V. SBCCS V will replicate the models of the existing Classical Charter Schools, which are Regents chartered. The vision is to open and provide more families the opportunity to attend a highly structured and rigorous school that values academics *and* character development.

The proposal was developed by Lester Long in collaboration with Francesca Emanuele. Ms. Emanuele is the current Specials Project Manager on the CCS Network Team and is working alongside Mr. Long on various strategic growth initiatives.

c. List of Founding Team Members

Provide a table that lists all key individuals involved in developing the application along with a brief biography (approximately one paragraph) for each founding team member. Founding team members include individuals who contributed to the development of the proposal and/or would play a role in the development of the proposed school. This response should also identify the overall leader(s) of the effort to develop the proposal, the individual(s) who served as the primary author(s), and the extent to which the founding team used consultants or similar external assistance.

Founding Team Member	Role	Biography
Lester Long	Executive Director	Mr. Long graduated from Dartmouth in 1993 and started his career in investment banking before he transitioned into a career in education through the NYC Teaching Fellows. Mr. Long earned his Master's in Elementary Education from Hunter College while teaching a range of grades and subjects in a Bronx elementary school. In 2006, Mr. Long founded South Bronx Classical Charter Schools and, since then, has expanded the network to four successful K-8 schools in the South Bronx.

Francesca Emanuele	Special Projects Manager	Ms. Emanuele graduated Saint Joseph's University in 2010 and joined Teach for America in 2013, launching her career in education at SBCCS I. After five years as a Kindergarten teacher and three as the Kindergarten Grade Team Leader, Ms. Emanuele transitioned into Instructional Coaching at SBCCS III and later SBCCS IV. After four years in that role, M. Emanuele moved into the role of Special Projects Manager working closely with Mr. Long and the Network Team.

Do not include proposed board members on this list (applicants will submit board member information as part of Request 14- Governance).

d. Withdrawn, Rejected, and Concurrent Proposals (SUNY and/or Other Authorizers)

Indicate whether this proposal, or any substantially similar proposal, was previously withdrawn from consideration or rejected by the SUNY Trustees and/or any other charter authorizer in any state or location (e.g., the New York State Board of Regents). If yes, provide:

- The name of the proposed school(s) when previously submitted;
- The date(s) of the previous submission(s); and,
- A detailed summary of what has changed in the proposal since its previous submission(s) and the rationale for these changes.

Indicate whether the applicant and/or founding team is currently applying for a charter from a charter entity other than the SUNY Trustees (e.g., the Board of Regents). This includes applications to charter entities in other states. If yes, provide:

- The name of the charter entity;
- The state where the application was submitted (if not New York);
- The name(s) of the proposed school(s) and the date(s) when the application(s) were submitted; • The status of the application(s)

Indicate if any of the lead applicants have ever had a charter school application granted by any charter authorizing entity in any state or location, but that school is no longer in existence. If yes, provide:

- The name of the school,
- The city and state where the school operated;
- The date the school opened and date the school closed;
- The name of the authorizing charter entity for the school; and an explanation of the circumstances that led to the school ending operations.

There have been no withdrawn or rejected proposals from this applicant, either with the SUNY Trustees or other charter authorizers. We are not currently applying for any charter from another charter entity.

All four Classical Charter Schools authorized with the New York State Board of Regents are still operating and performing well.

In 2019, Lester Long applied with the NYSED, but unfortunately the charter cap was reached then. The application was not formally denied, but the NYSED stopped reviewing all applications because they ran out of charters.

NOTES:

- *Failure to disclose previous applications by the same or a similarly constituted founding group for a substantially similar school to an authorizing entity in any state may result in the application's disqualification for review by the Institute.*
- *Applications submitted simultaneously to multiple charter authorizers in New York State will generally not be considered for review by the Institute. Simultaneous submission refers to a substantially similar proposal with a substantially similar applicant team and/or location contemporaneously under review by the Board of Regents.*

R-03e – Letters of Justification

e. Letters of Justification for Previously Denied Applications

If a charter entity in any state has provided any formal documentation to explain a decision not to not move forward an application for a substantially similar school (resulting in an applicant withdrawal, or denial of the application), attach the document(s) as part of this Response.

N/A. We have no previously withdrawn or denied applications with SUNY or any other charter authorizer.

R-03f – Founding Team Resumes

f. Founding Team Resumes

Submit a current resume or biography for all founding team members (not including board members, as board member resumes are submitted in Response 14).

Lester Samuel Long

[redacted]

ENTREPRENUERIALISM/LEADERSHIP

[redacted]

[redacted]

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- [redacted]
- [redacted] first viatical settlement securitization, backed by the face value of insurance policies of terminally-ill AIDS patients).

EDUCATION

Hunter College New York, NY
M.A. in Elementary Education May 2003

Dartmouth College Hanover, NH
B.A. in Economics, Concentration in Finance and Labor, adv. Study in Government and Math. June 1993
GPA: 3.2/4.0

Brookdale Community College Middletown, NJ
A.A. in Liberal Arts June 1991
GPA: 4.0/4.0

OTHER

[redacted]

[redacted]

Francesca (Febbraro) Emanuele

[redacted] | [redacted]

EXPERIENCE

[redacted]

[redacted]

- [redacted]
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EDUCATION

Master's Degree in Childhood Education 1-6

Relay Graduate School for Education, July 2015 | 3.8 GPA

Bachelor of Science, Psychology
St. Joseph's University, May 2010 | 3.9 GPA

[redacted]

R-03g – Probationary Status of Affiliated Charter School(s)

g. Probationary Status of Affiliated Charter School(s)

If any currently operating charter school within the proposed education corporation, or associated with the proposed charter management organization, or associated with the lead applicant(s) or founding team members, has been in violation of the terms of its charter or been placed on probationary status or any other corrective action within the current charter term, please provide written confirmation from the existing authorizing entity that the conditions related to the violation or probationary status have been satisfied and lifted. Failure to disclose this information may result in the application's disqualification for review.

N/A. No charter school associated with the lead applicant or founding team members has been in violation of the terms of its charter or placed on probationary status or corrective action.

What to Submit:

- Submit narrative response to Request 3(a-e) as a Word® file named: R-03ad- Proposal History.
- Attach any letters of justification as Word® or Adobe Acrobat® files named: R-03e- Letters of Justification.
- Attach founding team resumes as Word® or Adobe Acrobat® files named: R-03f- Founding Team Resumes.
- Attach probationary status of affiliated charter school(s) as Word® or Adobe Acrobat® files named: R-03g – Probationary Status of Affiliated Charter School(s).

R-04abc – Community Outreach, Support, and Demand

a. Description and Analysis of Community Outreach and Engagement

In order for the SUNY Trustees to consider any application for approval, the proposal must "rigorously demonstrate" that the applicant has conducted public outreach "in conformity with a thorough and meaningful public review process" designed "to solicit community input regarding the proposed school and address comments received from the impacted community concerning the educational and programmatic needs of students." In order for the Institute to recommend any proposal to the SUNY Trustees for approval, the proposal must include evidence of the following three criteria:

- The applicant informed the community of the intent to develop a school proposal in a timely fashion, including how to provide comment;
- The community had meaningful opportunities for input on that proposal; and,
- There was a thoughtful process for considering community feedback and incorporating it into the final proposal, especially regarding the educational program of the proposed school, and the educational needs of students.

Provide a narrative description describing efforts taken to demonstrate the three criteria listed above, including:

- The strategies used to solicit community input regarding the educational and programmatic needs of students and the plan to meet those needs;
- The form and nature of feedback received from community stakeholders and the process for incorporating that feedback into the submitted proposal; and,
- The extent to which, if at all, the proposal incorporates community input regarding the educational and programmatic needs of students.

The narrative should explain how comprehensive efforts were made to engage with community members that are fully representative of the overall community demographics described in Response 1.

This Charter Application was not developed alone. Instead, the experiences gained from the development of SBCCS I, II, III and IV will ensure that SBCCS V can be even more successful. These experiences are not the Lead Applicant's alone; instead, they are part of the entire South Bronx Classical community. Therefore, it is critical that this community, including this geographical community, has a legitimate and authentic voice in the development of the new school.

To that end, the Founding Team launched a three-tiered campaign to solicit feedback for this application:

1) CCS Stakeholders: Since we expect SBCCS V to be very similar in design to the other CCS schools, we wanted to ensure that stakeholders' opinions, experiences, and suggestions were requested and taken into account.

On February 6, 2024, the SBCCS V founding team held a public community meeting to describe the vision for its future school and the need it seeks to address. Invitations to the event were shared through Jupiter messaging with families currently enrolled at CCS to elicit feedback.

All stakeholders and attendees were invited to comment afterward, both at the meeting and in writing, with all information so solicited going directly and personally to the Lead Applicants.

2) Community Members: Acknowledging that SBCCS V will be a different school in many ways, with different staff, parents, scholars, etc., we have shared flyers with members of the community in Districts 8, 10, and 11. We visited various Head Start and daycare programs to share the potential opening of SBCCS V to collect feedback from the community. To date, we have not received any feedback outside of the CCS community.

3) Educational Experts: Lastly, we want to ensure that the proposed school is the best school it can be, mostly as defined by scholar achievement. Therefore, we have sought the guidance of various experts in various fields, who have read summaries of our school, and then responded with feedback incorporated into this Charter Application. Doug Lemov, author of "Teach Like a Champion", has visited and provided feedback. From 2015 to 2022, the Lavinia Group supported our work in Close Reading and Number Stories.

To promote a channel for continuous and ongoing public comment about proposed school growth, the founding team is accepting messages via email to our Special Projects Manager and one of the leads on this application ([redacted] This has been advertised in our communication with families in the community. Upon chartering, the proposed school will make its student applications available in person, via email, fax, on its website, and through mail, while also distributing them to Head Start programs, day care centers, and pre-schools.

Community Involvement

SBCCS V is designed to serve Bronx families who face great academic challenges, as evidenced by low test scores. Working together, the school and community can accelerate learning and increase educational success for its citizens. We have already developed relationships and support from several key political, business and community leaders.

SBCCS V will cultivate community support from political, business, and educational professionals, as well as from families and other local stakeholders. For instance, the school has already started contacting local community leaders, Head Start programs, and preschools to begin recruitment efforts.

The Founding Board fully recognizes the importance of community support to its success. Several elected officials have visited Classical schools over the year, providing insights, feedback, and financial support. Many of the elected officials we have listed above, in addition to writing letters of support, have offered their assistance once a charter is granted. They articulated the need for high-performing schools such as SBCCS V and especially welcomed the plan to enroll children in the very first years of schooling. Lastly, we have developed close ties with Fordham University, through our Board of Trustees, which has indicated willingness to be actively involved in SBCCS V once it has a charter.

CCS has always enjoyed and appreciated (and admired) the selfless work of the local elected officials and community leaders. They are much more interested in improving their communities than garnering political favor.

Building on this type of support, if chartered we intend to engage all established community contacts listed in this application, meeting with supporting elected officials, religious leaders, churches, and local community groups to deepen community ties and foster parental interest and knowledge of our school model.

To keep community stakeholders fully apprised of our progress, we will also revise our marketing and informational materials, already published and circulated in English and Spanish, that were used to gain support for the school. The materials will be regularly updated (including on our website) to highlight our model, goals, and the requirements and expectations of parents. We broadly distribute these pamphlets in the community where the school will be located as well as the surrounding area, including at community centers, churches and homeless shelters throughout the community and in shopping areas. One of our primary goals is to ensure that as many local families as possible are aware of this opportunity and choice for their child(ren), and to attract and enroll students from the entire community.

Although SBCCS V does not have a formal institutional partner, its immersion in the community and its affairs will enable it to build meaningful partnerships with the institutions set forth above. The existence of a strong Family Advisory Council, populated by parents with roots and present ties to the South Bronx, will enhance its ability in this respect.

In addition to the narrative description, this response may also include a table, bulleted list, etc. with information about outreach efforts. Concrete artifacts and evidence related to community outreach and engagement should be submitted in response R-04d, Evidence of Community Outreach and Engagement.

b. Description and Analysis of Community Support

Provide a narrative description of support for the proposal from community stakeholders or others including a candid analysis of both the depth of support and opposition to the school from stakeholders such as community members, civic organizations, and elected officials. Concrete artifacts and evidence related to community support should be submitted in response R-04e, Evidence of Community Support.

Please note that the content for this response differs from R-04a in that this response should focus on analyzing community interest and support for the school, any known opposition that may exist, and how that support and opposition will affect the school's ability to open successfully. In contrast, R-04a should focus on efforts to inform and engage with the community through the planning and development of the proposal.

The feedback during our community outreach meeting was very positive. Many families expressed their interest in our growth initiatives, and named families and friends in other districts would benefit from the opening of SBCCS V. A few families also recommended that we consider expanding grades to serve 9-12 in the years to come, something we have given thought to previously and may eventually return to in the future.

Written responses collected from local families shared a mix of positive and constructive feedback for the South Bronx Classical Charter School structure and prospect for growth. All responses received expressed appreciation for the focus on academic excellence, acknowledged growth they have seen since enrolling their child, several acknowledged the support and commitment of our teaching staff, and most shared their support of potential expansion and the opening of SBCCS V.

Some constructive feedback received involved the convenience of school locations (e.g., for our Summer Learning Academy program), length of the school day, and lack of informal, dress-down days for scholars.

c. Description and Analysis of Student Demand

Provide a narrative description of student demand including an analysis of evidence indicating that families with age-appropriate students would consider enrolling them in the school. Explain how this evidence supports the school's ability to meet its proposed enrollment. If using existing waitlists as evidence of demand, provide an estimate based on the experience of how many waitlist entries it takes to fill a seat. Concrete artifacts and evidence related to student demand should be submitted in response R-04f, Evidence of Student Demand.

Note for Replicators: If using the number of students on the waitlist of an existing school as evidence of demand for an additional school, be sure to clearly explain the relationship between that waitlist and the location of the proposed school.

As district schools are sadly underperforming, families are seeking alternative educational opportunities for their children, and many are looking at charter schools as the answer. SBCCS V would offer another exceptional charter option for families. SBCCS V will replicate the model and curriculum of South Bronx Classical Charter Schools, three of which have earned National Blue-Ribbon awards and all of which boast excellent results for students.

In District 8, for example, Kindergarten enrollment in charter schools has increased 20% over the past 10 years (table provided in Section 1 of this application). With the opening of SBCCS V, more families that are interested in a high-quality charter school education would have that available to them. And, in districts that do not currently have many operating charter schools open, this would be more beneficial to those families and to the greater community.

R-04d – Evidence of Outreach

d. Evidence of Community Outreach and Engagement

Submit documents that provide evidence of community outreach (e.g., flyers, websites, social media pages, in-person or virtual meeting announcements including dates and times, online survey results, media articles and advertisements, email outreach, etc.).

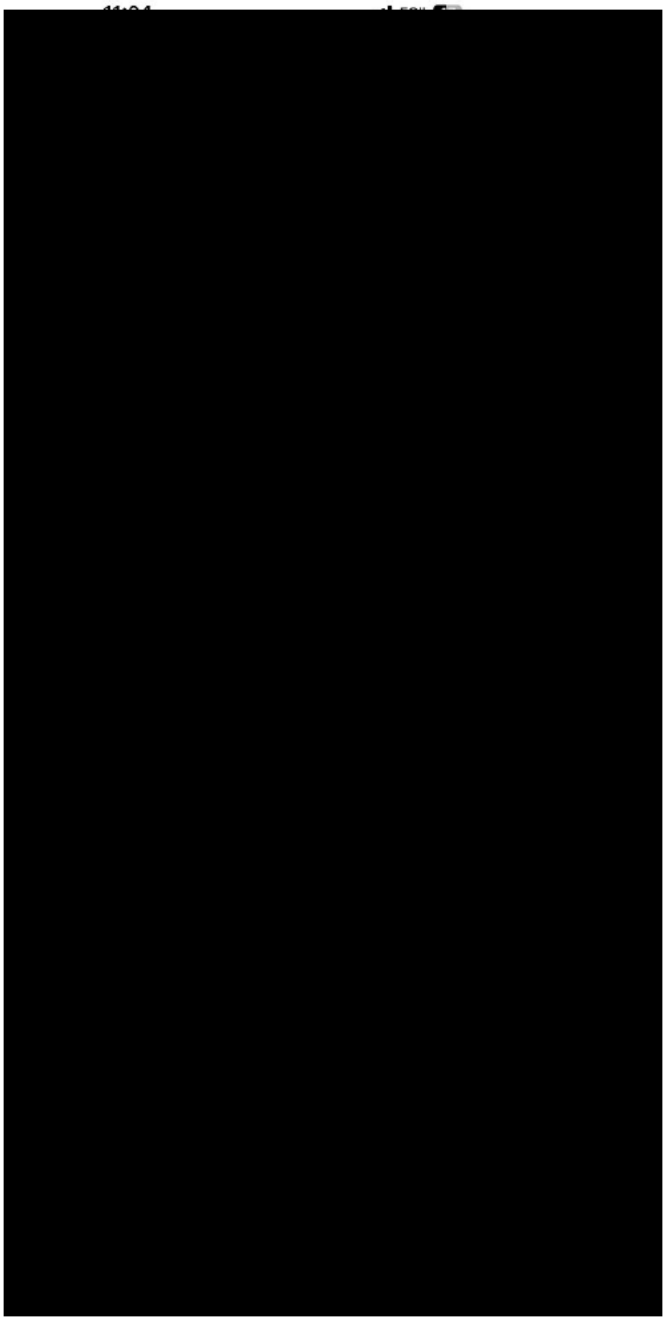
Evidence should demonstrate use of multiple strategies to solicit community input, and might include partnering with community-based organizations to host meetings, holding planning meetings with community members, addressing local elected officials or education stakeholder groups such as school boards, community boards, or (in New York City) Community Education Councils ("CECs").

In all cases, applicants should include a description of the outcome of any meeting requests of community stakeholders, even if the request was denied. Include a cover sheet with a table that identifies each document included with the evidence for this request, its page number(s), and a brief description of the document.

(4) Community Outreach, Engagement, Support, and Demand

d. Evidence of Outreach

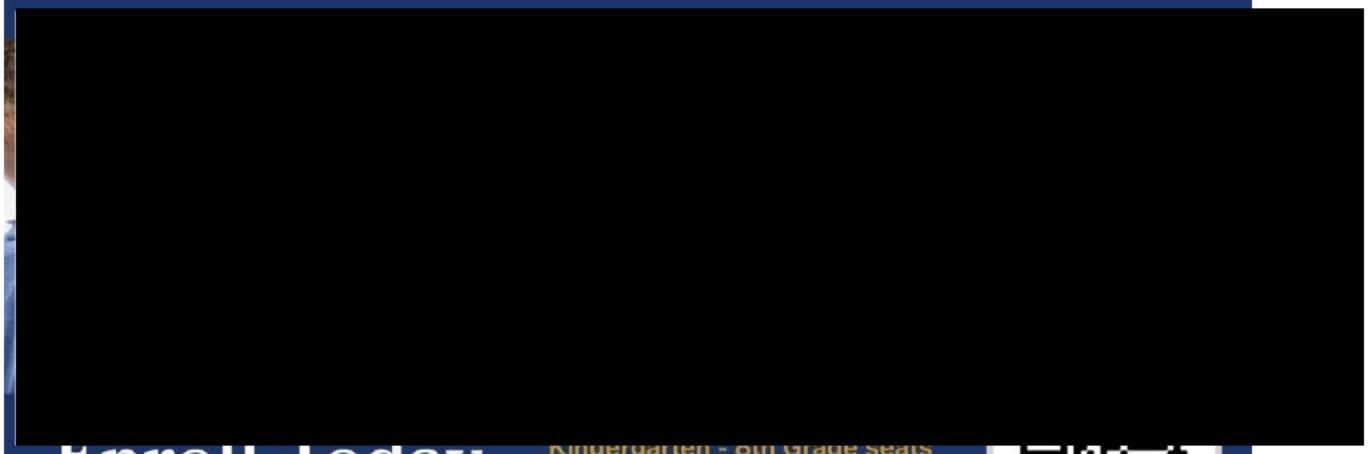
Evidence of Outreach	Page	Description
Community Feedback Request / Meeting Invitation (English)	2	Leadership communicated to the families currently enrolled at a Classical Charter School that we are hoping to expand and open a new school by Fall 2025. We shared this news, elicited written feedback from families (via email), and held a meeting to share our plans and hear other perspectives on our growth.
Community Feedback Request / Meeting Invitation (Spanish)	3	This feedback and meeting request was translated to Spanish to ensure accessibility for families wanting to share their ideas or participate in the meeting.
Existing SBCCS Enrollment and Promotional Flyers (English)	4	Flyers have been distributed in local communities both to promote enrollment efforts for the existing Classical Charter Schools and to spread the word that we are hoping to expand and open a new school in either District 8, 10, or 11. Flyers have been distributed at Head Start and Preschool programs, as well as to community members at bus and train stations.
Existing SBCCS Enrollment and Promotional Flyers (Spanish)	5	All flyers and promotional materials have been translated to Spanish for accessibility.
Petition for School Support	6	Leadership shared a petition with families if they would be supportive of the opening of SBCCS V and believe the school would be successful and valuable to the community it serves.



A First-Class Education
is Only One Click Away.

CLASSICAL
CHARTER SCHOOLS

Se Habla Espanol!



Enroll Today

Kindergarten - 8th Grade seats available!

91%
English Language Arts Pass Rate

4X
National Blue Ribbon Award Winner

97%
Math Pass Rate

About School

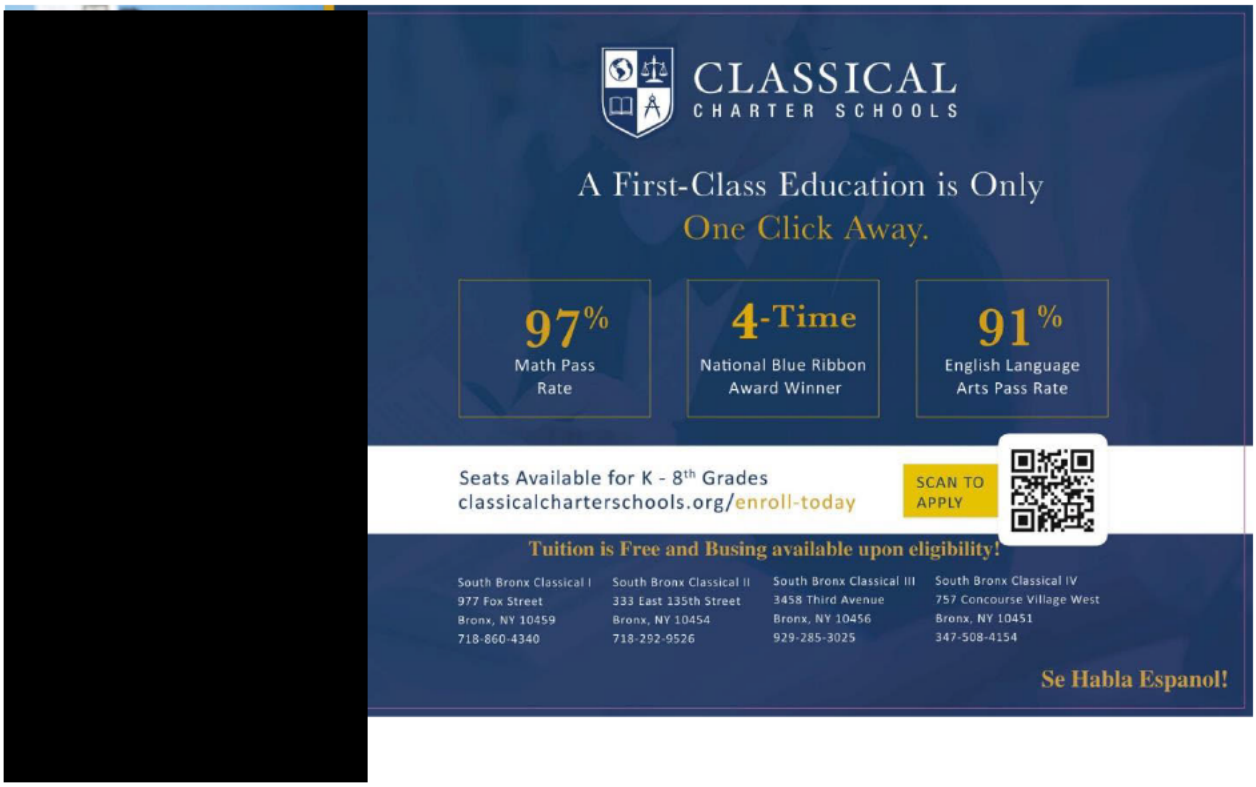
Classical Charter Schools prepares K-8 grade scholars in the South Bronx to excel in college preparatory high schools. Through a classical curriculum and highly structured setting, students become liberated scholars and citizens of impeccable character who achieve proficiency in and advanced mastery of New York State's Performance Standards.

Plan your visit

- **South Bronx Classical I:** Tuesdays at 4:00 pm + 4:45 pm
- **South Bronx Classical II**: Daily Tours Available!
- **South Bronx Classical III**: Wednesdays at 8:05-9:00 am and 4:45-5:15 pm
- **South Bronx Classical IV**: Tuesdays at 9:00 am + Thursdays at 4:00 pm

classicalcharterschools.org/enroll-today

South Bronx Classical I	South Bronx Classical II	South Bronx Classical III	South Bronx Classical IV
977 Fox Street	333 East 135th Street	3458 Third Avenue	757 Concourse Village West
Bronx, NY 10459	Bronx, NY 10454	Bronx, NY 10456	Bronx, NY 10451


CLASSICAL
CHARTER SCHOOLS
A First-Class Education is Only
One Click Away.
97%
Math Pass Rate
4-Time
National Blue Ribbon Award Winner
91%
English Language Arts Pass Rate
Seats Available for K - 8th Grades
classicalcharterschools.org/enroll-today
SCAN TO APPLY
Tuition is Free and Busing available upon eligibility!
South Bronx Classical I
977 Fox Street
Bronx, NY 10459
718-860-4340
South Bronx Classical II
333 East 135th Street
Bronx, NY 10454
718-292-9526
South Bronx Classical III
3458 Third Avenue
Bronx, NY 10456
929-285-3025
South Bronx Classical IV
757 Concourse Village West
Bronx, NY 10451
347-508-4154
Se Habla Espanol!

Una Educación de Primera Clase Está a Solo un Clic De Distancia

CLASSICAL
CHARTER SCHOOLS

Se Habla Espanol!

[redacted]

91%
Tasa de pase para artes del lenguaje inglés

4X
Ganador Nacional del Cinta Azul

97%
Tasa de aprobación de matemáticas

Nuestra declaración de misión:
Classical Charter Schools prepara a los estudiantes de grados K-8 en el sur del Bronx para sobresalir en las escuelas secundarias de preparación universitaria. A través de un plan de estudios clásico y un entorno altamente estructurado, los estudiantes se convierten en académicos liberados y ciudadanos de carácter impecable que logran competencia y dominio avanzado de los Estándares de Desempeño del Estado de Nueva York.

Fechas de la gira escolar:

- **South Bronx Classical I: Martes** a las 4:00 pm + 4:45 pm
- **South Bronx Classical II**: ¡Tours diarios disponibles!
- **South Bronx Classical III**: Miercoles a las 8:05am-9:00 am and 4:45-5:15 pm
- **South Bronx Classical IV**: Martes a las 9:00 am + Jueves a las 4:00 pm

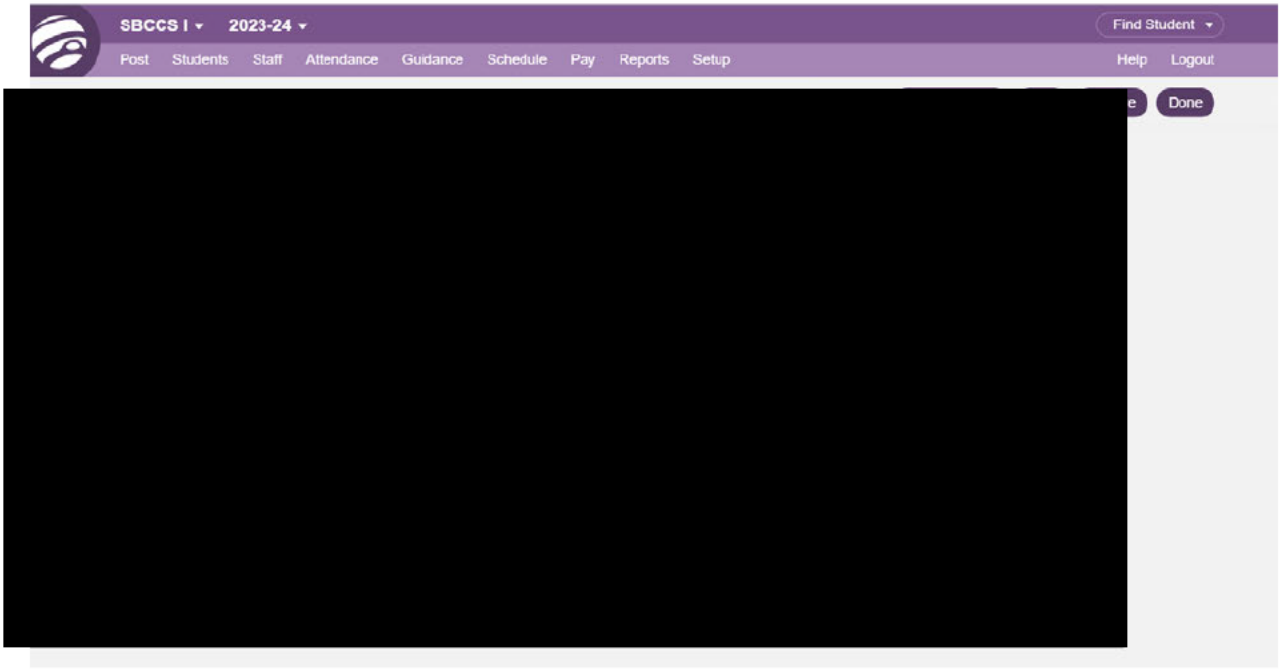
classicalcharterschools.org/enroll-today

South Bronx Classical I
977 Fox Street
Bronx, NY 10459

South Bronx Classical II
333 East 135th Street
Bronx, NY 10454

South Bronx Classical III
3458 Third Avenue
Bronx, NY 10456

South Bronx Classical IV
757 Concourse Village West
Bronx, NY 10451



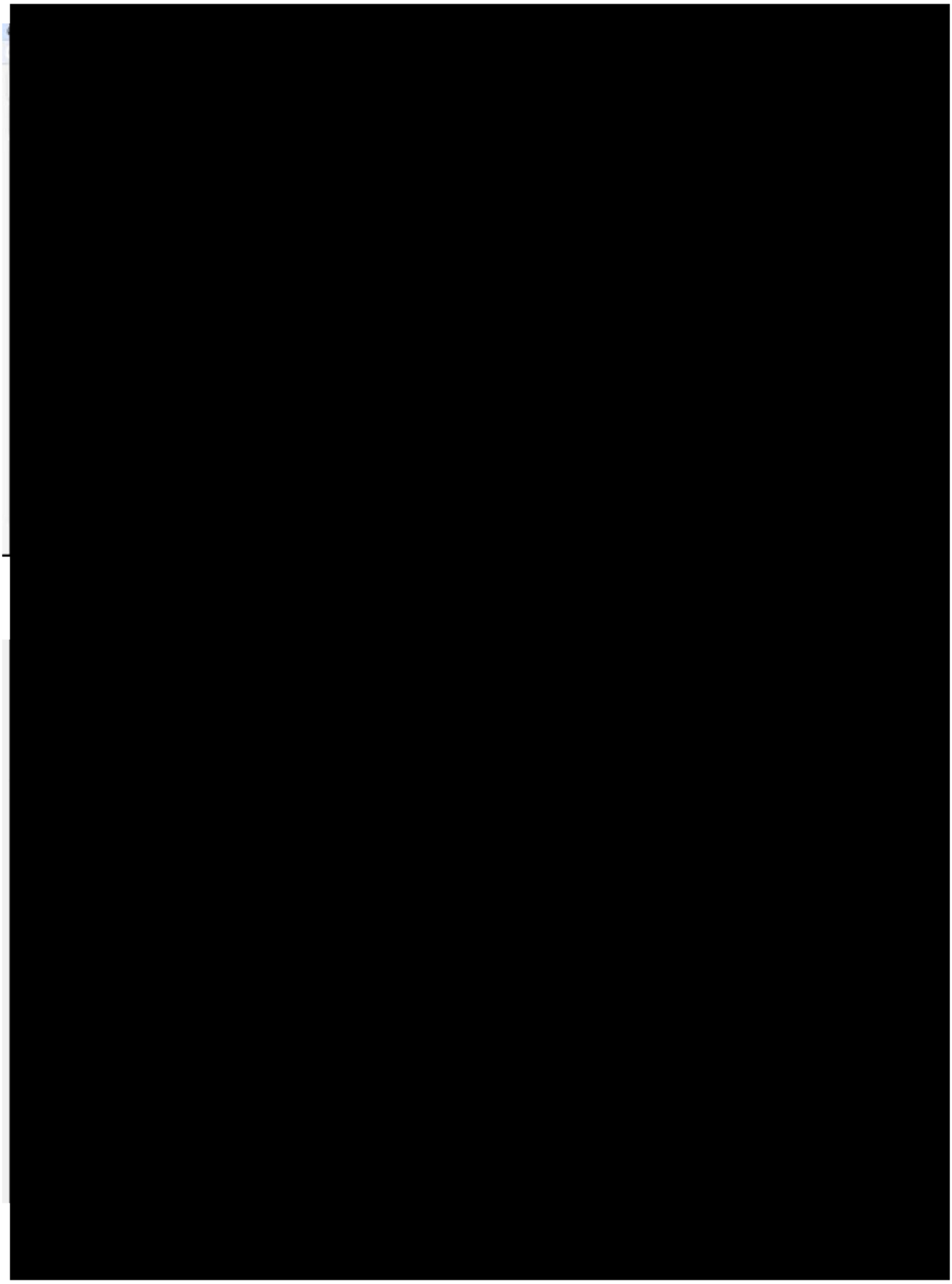
R-04e – Evidence of Support

e. Evidence of Community Support

Submit documents that provide evidence of community support (e.g., letters of support from community stakeholders, emails with evidence of support, petitions, online survey results, etc.). Evidence of support should be concrete and specific to the proposed school. Generic support for charter schools or educational choice and innovation in general is not sufficient. Include a cover sheet with a table that identifies each document included with the evidence for this request, its page number(s), and a brief description of the document.

(4) Community Outreach, Engagement, Support, and Demand
e. Evidence of Support

Evidence of Support	Page	Description
Family Support, Email	2	A current CCS parent shared feedback on the school, including ways in which our school can be improved as we make plans for growth.
Family Support, Email	3	A current CCS parent shared feedback on the school, including ways in which our school can be improved as we make plans for growth.
Petition in Support of SBCCS V Potential Opening in 2025	4	This petition was shared with families and community members to elicit feedback on the prospect of opening a new school in 2025. Within 24 hours, we received 183+ signatures and we are currently up to 248 signatures. We anticipate if we had started the petition earlier, the response would be greater, and more support would be voiced.



R-04f – Evidence of Student Demand

f. Evidence of Student Demand

Submit documents that provide evidence of demand for the school (e.g., petitions that clearly indicate signers have students of age to enroll in the school and would consider enrolling them in the school, etc.).
Include a cover sheet with a table that identifies each document included with the evidence for this request, its page number(s), and a brief description of the document.

In progress.

While our founding team is still determining the best location for this school, we have elicited feedback from current CCS families and local communities. There is a great amount of support for this growth initiative and confidence about its potential success; however, we do not yet have concrete evidence of specific community members in these districts that will enroll their children. One of our team initiatives for the Spring is to continue outreach in Districts 8, 10, and 11 to spread word and to further determine levels of demand and narrow down the best possible location for the school.

NOTE: If evidence of community outreach, support, and/or demand overlaps, it is not necessary to duplicate documents. Describe how any specific evidence of one demonstrates evidence of another in the applicable narrative description.

R-05ac – Enrollment

a. Enrollment Plan

Provide a narrative description of the following aspects of the school's enrollment plan including:

- The extent to which the proposed school's grade configuration aligns with the school district of location and how any misalignment may impact the school;
- Any differences in eligible or minimum age in the same grades between the proposed charter school and district schools;
- The pattern of growth over the charter term including anticipated student attrition, the rationale for the attrition rate, and plans to replace or limit the intake of students (i.e., the proposed school's "backfill" policy); and
- A statement about any growth that the applicants may seek in a future charter period if the school is renewed.

NOTES:

- *A charter school may not open serving only Kindergarten unless it is an existing SUNY authorized education corporation seeking to open an additional school.*
- *Unless there is a compelling reason, a charter school must enroll a minimum of 50 students at a single site by its second year of operation. If you believe there is a compelling need for an exemption to this requirement, contact the Institute before submitting your application.*
- *If a school's enrollment at any point in its first two years of operation exceeds 250 students, all employees of the school would be deemed members of a separate bargaining unit of the same employee organization that represents similar employees of the school district of location.*
- *The school district of location or NYSED reviews applications for pre-K programs. Applicants may not submit an application for pre-K until the SUNY Trustees approve the charter.*

Throughout the process of deciding to replicate, we have had numerous discussions with parents at SBCCS I, II, III and IV who have evidenced (including through the Learning Environment Survey) their satisfaction with the Classical Charter Schools education program. In addition, we have consistently communicated with elected officials and community leaders about the school, and our desire to expand. Based on these conversations as well as our current successes, we expect SBCCS V to be very similar in its design to SBCCS I, II, III and IV.

The most important display of need for the proposed school is student application volume at the other schools, SBCCS I, II, III and IV. As demonstrated below, SBCCS V will be able to easily fill its seats from the excess demand at other Classical Charter Schools with no need for additional marketing.

CLASSICAL CHARTER SCHOOLS LOTTERY HISTORY

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total Applications	**249**	**263**	**275**	**498**	**567**	**514**	[redacted]	[redacted]	[redacted]	**3244**	**4736**	**6465**	**7597**	**6914**	**4774**	**1929**	**2664**	**2517**
K Applications	112	180	160	259	270	284	386	[redacted]	[redacted]	[redacted]	2237	2728	3192	2736	1718	795	863	864
Available Seats	120	60	60	60	60	60	60	180	120	240	180	240	240	180	240	240	240	240
K Applications/Seat	**0.9**	**3.0**	**2.7**	**4.3**	**4.5**	**4.7**	**6.4**	**3.1**	**5.6**	**6.0**	**12.4**	**11.4**	**13.3**	**15.2**	**7.2**	**3.3**	**3.6**	**3.6**
WAITLIST	**-8**	**120**	**100**	**199**	**210**	**224**	**326**	[redacted]	[redacted]	[redacted]	**2057**	**2488**	**2952**	**2556**	**1478**	**555**	**623**	**624**

Recruitment

SBCCS V has a marketing and recruitment plan that will ensure equitable widespread access and information to all families, including those with children at-risk for academic failure. The proposed school will comply with all aspects of the Charter School Law of 1998, as amended and specifically including the amendments of 2010, which includes the development of specific strategies to attract families of Students with Disabilities, English language learners, and students eligible for the free and reduced lunch program ("At-Risk" students).

SBCCS V will set aggressive enrollment targets based on the document published by the Charter Schools Institute of the State University of New York entitled "Preliminary Enrollment Targets". The following table displays the targeted enrollment goals of SBCCS V, depending on the district the school is eventually housed in:

District	ELL %	FRLP %	Special Education %
7	17%	90%	18%
8	12%	85%	18%
9	24%	90%	15%
11	11%	78%	17%
12	19%	92%	18%

SBCCS V seeks to match these figures and continues to seek best practices of charter schools to encourage special student populations to apply. SBCCS V marketing materials and student applications will include language (in both English and Spanish) encouraging special student populations to apply to the school through the lottery. The school will hold several parent orientations at the school, preschools, Head Start programs, and day-care centers, to provide assistance to families of special student populations. Our Director of Scholar Services will attend all such parent orientations and answer any questions parents of special student populations may have at the orientations or at any other time. Just as at SBCCS I, II, III and IV, an employee fluent in Spanish will answer our phones and emails to ensure that interested parents are encouraged to apply. We have outlined several ways in which we have and will recruit this population of students and ensure that information is accessible to them.

1. SBCCS V will mail school information, including information about its instructional program, and strong results (SBCCS I, II, III and IV), special education and ELL support services, and student applications, to nursery schools, Head Starts, and community organizations. All materials will also be available in Spanish.
2. All school information sessions, including those off-campus at nursery schools and Head Starts, will be held with a Spanish speaking translator. In addition to presenting information about the school's academic program and behavioral expectations, SBCCS V will present aggregate data on the academic performance of Classical Charter Schools' Students with Disabilities, English language learners, and students who are eligible for free and reduced price lunches as compared to District and other charter schools, as a way to ensure that families understand our success with educating these populations of students.
3. Operations staff and our Director of Scholar Services will attend student recruitment fairs. At these fairs, a bilingual staff member will be present. Information about SBCCS V Special Services, including the supports we offer to Students with Disabilities and English language learners, will also be distributed at the fairs.

4. Flyers about the SBCCS V, and our enrollment process, will be distributed around the South Bronx. All flyers will be in English, Spanish, and other common languages that are spoken in the district.
5. SBCCS V will give presentations to local community organizations that serve ELL populations, including Mott Haven Community Partnership Program and South Bronx Churches and discuss the specific support we will offer ELL scholars.
6. We will do outreach and distribute information about SBCCS V, in both English and Spanish, to local NYCHA housing developments to recruit scholars who might be eligible applicants for the free and reduced price lunch program.
7. We will advertise SBCCS V on Facebook, and have all advertisements translated into Spanish. Using clear and specific language, we will encourage English language learners, Students with Disabilities, and students who are eligible applicants for the free and reduced price lunch program to apply to the school.
8. We will advertise SBCCS V in El Diario, a Spanish newspaper, and, using clear and specific language, encourage English language learners, Students with Disabilities, and students who are eligible applicants for the free and reduced-price lunch program to apply to the school.
9. We will participate in the Vanguard mailings and mail information pamphlets, student applications, and information about our special education and ELL support services to residents of SBCCS V's Community School District.

Admissions and Enrollment

The SBCCS V student application will be made available via walk-in, email, mail, and via our website. In addition, we will distribute the applications through various Head Start programs, pre-schools, and day-care organizations throughout the community. We will also use the Online Common Application as organized by the New York City Charter School Center. SBCCS V will hold a public lottery in the sited community in a fair and blind manner, giving preference to siblings and then scholars located in our Home District.

Retention

One of the core challenges facing charter schools is creating a tenacious culture of high expectations while minimizing scholar disenrollment, especially in highly-mobile areas such as the South Bronx. To that end, SBCCS V developed a plan explicitly to reduce attrition. We will meet with prospective parents with a unified, clear, and detailed description of our school, our policies, and our requirements. This will reduce the incidence of parents deciding to enroll their scholar and then choosing to disenroll him/her due to concerns such as length of the day or year, amount of work, or behavioral expectations. Secondly, we will work to ensure that parents who have moved some distance from the school do not disenroll their children. In some instances, at SBCCS I, II, III, and IV we have given MetroCards to parents who can't afford to bring their children to school. We have also worked with the bus company to change stops so that such scholars can continue to attend. These types of efforts have proven successful at SBCCS I, II, III and IV and we will use them, among others, at SBCCS V.

We know that the retention of our At-Risk scholars is equally important. We are committed to supporting all scholars to meet the high expectations of our rigorous academic program and we will have a targeted approach to support and retain scholars with language and learning differences. Starting in kindergarten, or when a scholar is identified as a student with a disability or as an English Language Learner, we will establish a close relationship with the family. This includes regular communication with families via home-school logs and phone calls, as well as meetings with the team of educators who work with their scholars. During this contact, we will communicate their scholar's progress, areas of growth and areas of concern. We will regularly evaluate changes in service depending on scholar progress, and service providers will maintain at least monthly contact with parents. We will send home enrichment activities for scholars in areas we have identified for growth and parents will be provided with staff members' contact information, and an open-door policy will be strongly communicated. At Classical Charter

Schools, these methods have reduced our Students with Disabilities attrition rate to 14%, near our total average of 12%.

When a scholar is struggling, we will invite parents to observe their child and we will work as a team to determine how to better support the scholar. In all communication with parents, we will emphasize a commitment to each scholar's growth through whatever resources we have available. It is our hope and expectation that with a high level of parent engagement, communication, and collaboration, SBCCS V will experience strong student retention.

Vacancies

While we do not expect to enroll students after the fifth grade, we do enroll siblings into all grades. A separate waiting list will be used in case of excess vacancies. SBCCS V documents its attempts at locating families on the waiting list; if we are unable to locate a child's family, then the next child on the list may be offered admission. In addition to the waitlist, at time of enrollment, any older sibling of an incoming kindergarten scholar will be offered a seat at Classical Charter Schools.

Scholar Withdrawal or Transfer

Families of scholars may withdraw at any time. All withdrawal notifications must be made in writing. We will provide as seamless a transfer or withdrawal as possible. Scholars who have been absent for five consecutive school days without notice and have not contacted the school may be removed from the school's register. Lastly, if SBCCS V is officially notified that a scholar is attending another school, that scholar, after an investigation, may be disenrolled.

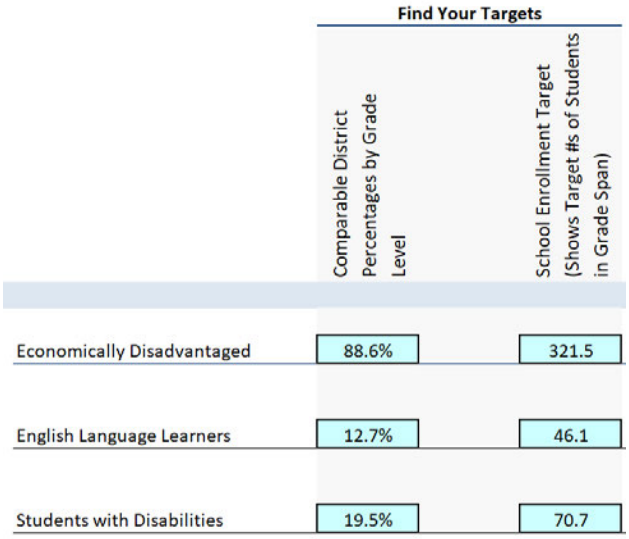
b. Target Population Enrollment

Explain how the school will meet or exceed the enrollment and retention targets established by the SUNY Trustees for students with disabilities, ELLs, and FRPL students. The response should:

- Cite the proposed school's enrollment and retention targets as determined through the enrollment and retention calculator found on our website;
- Describe the recruitment strategies the school will employ to attract each target population to the school;
- Describe any at-risk admissions factors, set-asides, or "preferences" the school would offer to increase the likelihood of enrolling targeted students;
- Provide a brief explanation of the efforts, resources, structures, or programs that the school will employ to retain these students and how the school will monitor the efficacy of such efforts including disaggregation of student performance data for each subgroup; and,
- Any replicator that is not currently meeting targets at any of its schools must provide an explanation as to why it is not meeting the targets, efforts made to meet the targets, and what new strategies the applicant intends to employ to meet the targets.

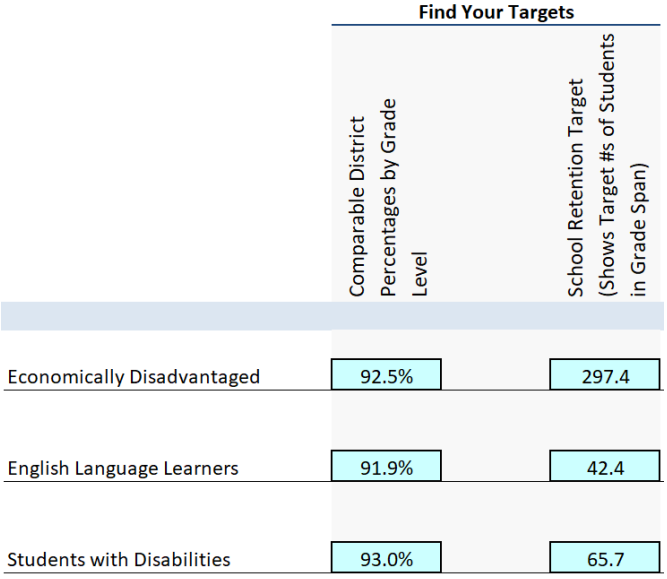
Note: Including preferences beyond one extra weight (ticket) in the lottery may make the proposed school ineligible to receive federal Charter School Program ("CSP") grant funding.

The school's enrollment targets are displayed here:



Find Your Targets	Comparable District Percentages by Grade Level	School Enrollment Target (Shows Target #s of Students in Grade Span)
Economically Disadvantaged	88.6%	321.5
English Language Learners	12.7%	46.1
Students with Disabilities	19.5%	70.7

The school's retention targets are displayed here.



Find Your Targets	Comparable District Percentages by Grade Level	School Retention Target (Shows Target #s of Students in Grade Span)
Economically Disadvantaged	92.5%	297.4
English Language Learners	91.9%	42.4
Students with Disabilities	93.0%	65.7

SBCCS V will recruit new families through community outreach, visits to local Head Start and preschool programs, and through advertising efforts. Advertisements have been purchased in local papers, in Bronx-based Blogs, on billboards, bus stops, and MTA subways. We will also be broadcasting an advertisement in Spanish through a local radio station.

SBCCS V is committed to enrolling students with disabilities ("SWD"). In addition to targeted outreach and recruitment efforts, the school will use a weighted lottery for the applicants with disabilities to increase those students' chances of being randomly selected for an available seat. To identify as many students with disabilities applicants as possible, we shall include the following on its application:

1. Does your child have an individualized education plan (IEP)?
2. If your child is currently in pre-k or not yet enrolled in kindergarten, does your child currently receive early intervention services (such as special education, speech and language, occupational or physical therapy) through the Committee on Preschool Special Education (CPSE) process?
3. Does the student receive special education services?
4. Does your student have a disability or impairment?
5. Do you have concerns about your child's development, learning, and/or behavior that you believe required a special education evaluation or special education services?

If you answered "yes" to any of the questions and you are offered a seat through the lottery or waitlist process, you will be required to provide appropriate documentation related to your answers prior to your child's enrollment. If a seat is offered based on insufficient information, the offer will be rescinded, and the seat will be offered to the next student on the waitlist.

Prior to April 1st each year, the school identifies targets for enrollment of students with disabilities, and applies weights based on gaps between the actual current enrollment and the target for the subgroup, set forth in the NYSED Charter Schools Office performance framework at (http://www.p12.nysed.gov/psc/regentsoversightplan/section3/PerformanceFramework2019.pdf).

- If the School is more than 5% below the target for the subgroup, a weight of two will be applied
- If the School is more than 10% below the target for the subgroup, a weight of three will be applied
- If the School is more than 15% below the target for the subgroup, a weight of four will be applied
- Students will be awarded no more than a weight of four.

Once scholars are enrolled at SBCCS V, we will ensure they receive all mandated services that we offer including SETSS, Speech, Counseling, and OT/PT (through outside providers). Additionally, we implement an intervention program to support any scholars struggling academically. Through frequent data collection and analysis, teachers will be able to assess scholar progress toward IEP and academic goals and ensure they are receiving the differentiated support they need to thrive at our school.

Beyond this, our Instructional Coaches will add a layer of accountability and support to ensure academic instruction, intervention, and mandated services are executed at a high-quality and that children are best supported. This looks like weekly observations of instruction, shared data analysis, and collaboration with planning and differentiation with our most at-risk scholars in-mind.

c. Student Enrollment Table

Complete the student enrollment table provided in the budget template and include a copy of it with this request. The proposed enrollment should be entered in exact absolute numbers (e.g. 135) and not as a range (e.g. 130-140).

Note for replicators: Include separate enrollment charts for both the proposed new school and for the overall education corporation.

The enrollment table below outlines anticipated SBCCS V enrollment by grade across years.

SOUTH BRONX CLASSICAL CHARTER SCHOOL V
2024-25 through 2028-29

CHARTER ENROLLMENT BY GRADE							
GRADES	**LEVEL**	**2024-25**	**2025-26**	**2026-27**	**2027-28**	**2028-29**	**AGE RANGE**
Kindergarten	Elementary School	62	62	62	62	62	4-5
1st Grade	Elementary School	62	62	62	62	62	5-6
2nd Grade	Elementary School		62	62	62	62	6-7
3rd Grade	Elementary School			62	62	62	7-8
4th Grade	Elementary School				62	62	8-9
5th Grade	*Elementary School*					62	9-10
6th Grade	Middle School						
7th Grade	Middle School						
8th Grade	Middle School						
9th Grade	High School						
10th Grade	High School						
11th Grade	High School						
12th Grade	High School						
Ungraded							
TOTAL		124	186	248	310	372	

R-05d – Admissions Policy

d. Admissions Policy

Describe the admissions policy for the school including any at-risk designations or set-asides, and how the school intends to apply the statutory preferences for returning students, siblings, students residing in the school district or CSD of the location of the proposed school, and employees of the education corporation or CMO (up to a 15% set aside) in accordance with the Act. The admissions policy should also indicate in which grades the school would admit students, whether it would fill seats vacated by enrolled students (i.e. "backfill"), and if applicable, the date after which the school would no longer accept students. Further Institute guidance relating to school admissions, including the new employee and CMO employee preference, is available on our website.

A child who is legally qualified for admission into any New York state public school is also qualified for admission, without charge, to SBCCS V. Admission will not be limited on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion or ancestry. Admissions are always done via lottery if there are more applicants than seats, but students who are siblings of current students and/or live in the local community receive an admissions preference in the lottery. If the school at any time has a scholar enrollment that is 10% over or under its enrollment plan, it will notify its authorizer.

In its first year, SBCCS V will enroll scholars in Kindergarten and First Grade. Thereafter, it will admit most of its scholars for Kindergarten and will back-fill as it is able from first to fifth grade. Children must turn 5 years old by December 31 to be eligible for Kindergarten, just as in the New York City public schools. In mid-December 2024, applications are made available via mail, pick-up at the main office, fax, our website, and email. By April 1, all applications must be received. The table below outlines the key dates for admissions in the 2025-2026 academic year.

South Bronx Classical Charter School V	
Admission Policy and Calendar	
Date (2025)	Event
January 1	Application is available via website, fax, office, mail, and email.
February 11	Visit Head Start Program #1
February 14	Information Session #1 (morning)
February 26	Information Session #2 (afternoon)
March 9	Visit Head Start Program #2
March 23	Information Session #3 (evening)
March 26	Final date for Application Receipt
March 27	Determination of Application Eligibility
April 1	Public Lottery
April 5	Applicants receive enrollment documentation or wait list status and rank
April 20	Deadline for contract return
April 28	Request student records from District

SBCCS V will distribute flyers and pamphlets throughout the local community advertising for admission. As mentioned above, information sessions will be held in the community to inform families and community members about the school and the admissions process. Information sessions will be held during January and February preceding the academic year. While these information sessions will not be mandatory, they will be strongly encouraged. The purpose of the sessions is to allow parents to make an informed choice for their child. All information sessions will feature a Spanish translator and accommodations for the disabled to attend. Each of the sessions will be similar, so there will be no need for parents to attend more than one.

If the number of applications is greater than the number of available seats, then a public lottery will be held. For School Year 2025-2026, the lottery will be held the first week of April 2025. The lottery will always be held on or after April 1 of each upcoming academic year.

Admission will be based on the following preferences in strict order. After the first year, first priority will be for returning scholars. Once those slots have been filled, siblings of returning students or siblings of students who have also been accepted in this lottery are accepted. Third priority will be those students living in the home district of SBCCS V. Thereafter, applicants from outside the home district will be drawn. All names will be pulled and put onto a list in the order they were selected. SBCCS V does not give preference to the children of staff or board members.

Within three days of the lottery, SBCCS V will send letters of notification to parents, stating either their acceptance to SBCCS V or their waitlist status and number. Scholars who have been accepted will receive an enrollment form and will be asked to sign the Classical Covenant, a tri-partite list of rights and responsibilities for the school, parents, and the soon-to-be scholar.

Families will have approximately 14 days to sign and return the Enrollment Forms via mail or drop off. Though signing the covenant will not be a requirement for enrollment, we will encourage parents to indicate their support

of the program. If not received by the deadline, the applicant loses his/her seat and we will contact the next name on the waitlist.

If the number of applications is less than the number of available seats, then, rather than through a lottery process, all scholars will be admitted, and a second round of information sessions will be held to fill any remaining seats. If a second lottery process is necessary, the Public Lottery will be held 30 days after the first lottery held (for example, April 30, 2025 if the first lottery is held on April 1).

All scholars who are accepted for enrollment or re-enrollment must complete all required enrollment forms on time to enroll at SBCCS V. If these forms are not completed and returned on time, the relevant scholar loses his/her spot on the waiting list. These forms include proof of the child's successful completion of the previous grade, if entering after Kindergarten. Families will also receive the SBCCS V Family Handbook, which will include the Discipline Code, and the Classical Covenant.

Note for replicators:
(1) Education corporations operating an existing Universal Full-Day pre-Kindergarten may provide a preference to those students in admission to the Kindergarten of a new school(s), but should do so consistently across all schools. This preference does not extend to pre-Kindergarten programs operated by community based organizations related to the charter school(s).
(2) In the case of an existing education corporation proposing to operate an additional school, note that each school may have its own distinct admissions policy; they do not need to be uniform across schools.

Information for Replicators:

- Submit the response to Request 5(a-d) as a Word® file named: R-05ac- Enrollment.
- Attach the school's admissions policy as a Word® file named: R-05d- Admissions Policy.

What to Submit:

- Submit the response to Request 5(a-d) as a Word® file named: R-05ac- Enrollment.
- Attach the school's admissions policy as a Word® file named: R-05d- Admissions Policy

R-06af – Curriculum and Instruction

NOTE: The responses to Requests 6(a-f) together may not exceed a total of 50 pages in length. This does NOT include Request 6(g) - Draft Accountability Plan. The Institute encourages applicants to use Requests 6(a-f) to develop a narrative explaining in detail the proposed school's academic program and use Request 23 – Supplemental Information to provide any supporting curricular artifacts (e.g., planning templates, pacing calendars, evaluation rubrics, etc.).

a. Curriculum Selection Process

Summarize the school's curriculum, by subject, and the rationale for all curriculum decisions including:

- Research-based evidence of effectiveness, particularly in meeting the needs of the school's target population, including proper citations;
- Discussion of how the school's curriculum is aligned to New York State standards;
- An explanation of how the curriculum aligns with the school's educational philosophy and furthers its specific mission, key design elements, and unique themes;

- How teachers will know what to teach and when to teach it including the curriculum resources that will support instructional planning (e.g., curriculum maps, scope and sequence documents, pacing guides, etc.), and specifically address who will be responsible for creating or selecting these resources; and,
- The processes and procedures the school will use to review, evaluate, and revise the curriculum to ensure its effectiveness for all students, alignment to state standards, and alignment from grade to grade including who will be responsible for these processes and how teachers will be involved.

SBCCS V intends to use and refine curricula developed by Classical Charter Schools. As the mission and design of SBCCS V will match those of CCS, by extension the curricula will also be consistent. SBCCS V has ensured that our curriculum (in all grades and in all subjects) is fully aligned with the New York State standards (inclusive of the Common Core State Standards as adopted and applicable). The Classical network's strong results are due, in large part, to this alignment and the quality of our curriculum. In fact, that alignment is expressly described in our mission statement.

SBCCS V's mission endeavors to prepare its scholars to "achieve proficiency in and advanced mastery of New York State performance standards." We have a rigorous, sequential and modular standards-based curriculum, where the standards are embedded in the unit plans, lesson plans, assessments, and even assessment data. Our curricular philosophy is to create and constantly improve upon standard-based scopes and sequences, cohesive and interrelated unit plans, and detailed and flexible lesson plans, all in an organized format for all subjects and grades. New York State standards dictate what we must teach and what the scholars must master to be promoted to the next grade, and the alignment across the curriculum gives us clear and measurable data from which we can measure scholar achievement.

We are certain that having an organized and rigorous standards-based curriculum is the first step to measuring scholar achievement. In addition, we believe that a teacher's execution of the curriculum, the assessment of scholars' understanding of the standards and the subsequent data that come from the assessments, and the culture of analysis that helps inform improvement of the curriculum and teacher execution, ultimately make up our instructional cycle. Our instructional leadership team (including a Director of Curriculum and Instruction, Curriculum Manager, and a team of Instructional Coaches) is wholly focused on ensuring that this instructional cycle is executed thoughtfully and faithfully each day.

We designed a school model that we believe best meets the needs of our target population, and which is embedded within the guiding framework of a classical education. The key components of a classical education in the early years focus on a core curriculum, the development of strong literacy and numeracy skills, knowledge, and understanding of elementary facts. In addition, scholars starting as young as kindergarten are exposed to higher-level exploratory thinking and discussion throughout the day, but especially during our 45-minute problem-solving block called Number Stories and our Close Reading literacy block. In all grades, students develop core knowledge in the basic subjects of reading, writing, math, science, and history, and are challenged to think critically about content and skills.

Scholars enjoy approximately 100 minutes a day of math instruction. There are three main math blocks: our daily math lesson, where scholars systematically cover all standards as outlined by the Common Core; our reteach block, where teachers have the opportunity to thoughtfully fill knowledge gaps by planning instruction in response to data from our unit and interim assessments; and, finally, Number Stories. During Number Stories, scholars have the opportunity to creatively solve a rigorous word problem. As scholars are solving the problem, teachers are actively circulating and conferring to determine which scholars should share during the discourse portion of the block. For the last 20 minutes of the block, scholars are expected to thoughtfully share their strategies and work

with their peers to come up with math conjectures. While scholars are sharing their strategies, the teacher is charting the strategies which scholars can then reference in future lessons to solve future problem types. In addition to these blocks, we have also implemented a Number Routines block. During the Number Routines block, scholars are given about 15-20 minutes to grapple with a routine, like counting jar, count around the room, true false number sentences or number strings. Number Routines supports our scholars' development of numeracy, promotes flexibility with computational strategies, develops efficient mental math strategies, and encourages scholars to invent algorithms to support the individual needs of mathematicians. Number Routines is discussion based so that scholars have the opportunity to learn from one another.

Scholars spend over three hours a day focusing on ELA. Our scholars receive instruction in the following blocks: phonics (K-1), grammar (3-8), writing (K-8), read aloud (K-5), reading (6-8), guided reading (K-6), close reading (K-6), and textual analysis (3-8). Phonics, grammar, writing, read aloud/reading, and textual analysis are all scripted lessons taught in whole group settings. Teachers are responsible for thoughtfully planning and preparing (with support from instructional coaches) data-driven Guided Reading and Close Reading instruction that is individualized for each small group and meets scholars' individual learning needs. Close Reading was first introduced during the 2015-2016 school year and is a block that we feel tremendously impacts a scholar's ability to read and thoughtfully respond to complex text as evidenced by our improved test scores across grades 3-8 on the NYS ELA Assessments.

In addition to our core math and ELA blocks, scholars receive instruction in both science and social studies. Our science curriculum is based on Next Generation Science Standards. Scholars have the opportunity to execute numerous rigorous experiments or investigations beginning in early kindergarten and continuing through 8th grade.

Our social studies curriculum aligns to the New York State K-12 Social Studies framework. We're fortunate to be based in New York and to have access to many important cultural sites, which scholars will visit on field trips to deepen their understanding of the topics reviewed in social studies. For example, our 5th graders travel to DC to connect to our history studies and their preparation for the 8th grade US History Regents. In the early grades, social studies is taught for half the year and science is taught for the other half. Beginning in 4th grade, scholars have both social studies and science daily.

Additionally, starting in 3rd grade, scholars start learning Latin, and they continue their study of Latin through 8th grade. In 7th and 8th grade Latin, scholars learn how Rome was founded and study its society. Then, in 8th grade, our scholars travel to Italy for a week, visiting Florence, Venice, Pompeii, and Rome, providing them the opportunity to experience the places and sights they have studied in class. Starting in 4th grade, our scholars begin Debate, a block that develops both critical thinking and public speaking skills and continues through 8th grade. These skills are critical ones for scholars to sharpen as they prepare for high school.

Though our internally created curriculum is one of our greatest strengths, we haven't always had this resource in place. Prior to 2010, used boxed programs such as Open Court Reading, Saxon Math, Core Knowledge History, and FOSS Science. Beginning in 2010, CCS undertook a massive curricular project to provide our scholars with an even more rigorous and standards aligned education. In total, our staff created 374 unit plans and over 20,000 lesson plans. The goal was to create backwards designed, custom, school-specific curricula that addressed all the Common Core Learning Standards and New York State Performance Standards for each subject area and grade level that also enabled the highest levels of student achievement. Instructional leadership analyzed state-mandated learning standards to create internally developed scopes and sequences, unit plans and lesson plans based on those unit plans.

Curricular Review, Audit, and Revision Process

Teachers were heavily involved in the creation of these lesson plans, which have been refined and revised each year under the supervision of our instructional leadership team. The Curricular Audit is an annual review of each grade-level's curriculum. It is completed in trimester-based stages throughout the school year by grade teams or subject teams in the case of Specials (Art, Music, Fitness), reviewed by the Director of Curriculum & Instruction (DCI), Curriculum Manager and Instructional Coaches, and approved for implementation in the following school year's curriculum. The Curricular Audit by grade is overseen by Grade Level Vetters (Instructional Coaches with delegated oversight over a specific grade's curriculum) while the process for all grades is managed by the Curriculum Manager.

All teachers are encouraged to contribute comments to the Curricular Audit after reflecting on curriculum taught and reviewing grade-level data in comparison to last year. Teachers add individual actionable line items into the Curricular Audit based on reflection on teaching a unit or lesson following the template of the excel document, including the estimate amount of work time required to make the revision. Proposed changes are also categorized by type, including minor error/editing corrections, technical, structural, or content revisions, updates related to DEI initiatives, or larger scale changes. Larger scale changes might include creating new units of study, replacing texts, or implementing new learning experiences.

Using the trimester-based deadlines set by the Curriculum Manager:

1. Grade team or subject leaders review comments added by teachers to ensure specificity, actionability, and relevance to the mission and vision of the Network.
2. Grade Level Vetters then review the Curricular Audit for their grades and provide feedback to grade team and subject leaders for revisions to the audit comments.
3. The Curriculum Manager and the DCI then review all audits and provide feedback on the documents.
4. Grade Level Vetters manage the implementation of any final feedback from the Curriculum Manager and DCI.

The Curricular Audit is finalized by the end of the school year and revision work, now completed by the Curriculum Team or Instructional Coaches, begins over the summer and continues into the school year. The team ensures proposed and approved changes are implemented before the content is reviewed and taught by teachers.

Curricular Alignment

We align our curriculum to the New York State Standards, and, within our network, we ensure there is alignment across grades and schools. Teachers know at the start of the year exactly what lessons they are going to teach each day as each day of instruction has been mapped on a curriculum calendar that all schools in our network follow. The calendar is built off our existing curricular scope and sequence and is managed by our Curriculum Manager and Grade Level Vetters.

Our lesson plans range in length from four to twenty pages depending on grade level and subject. These lesson plans are incredibly detailed and outline exactly what objectives will be taught, how they should be taught, and the time allotted for each section of the lesson. The plans are highly detailed and include the instructional strategies to use, including which questions should be posed in a turn and talk format, when teachers should use techniques such as "whip-arounds," and particular areas to focus on during a writing share, to name a few.

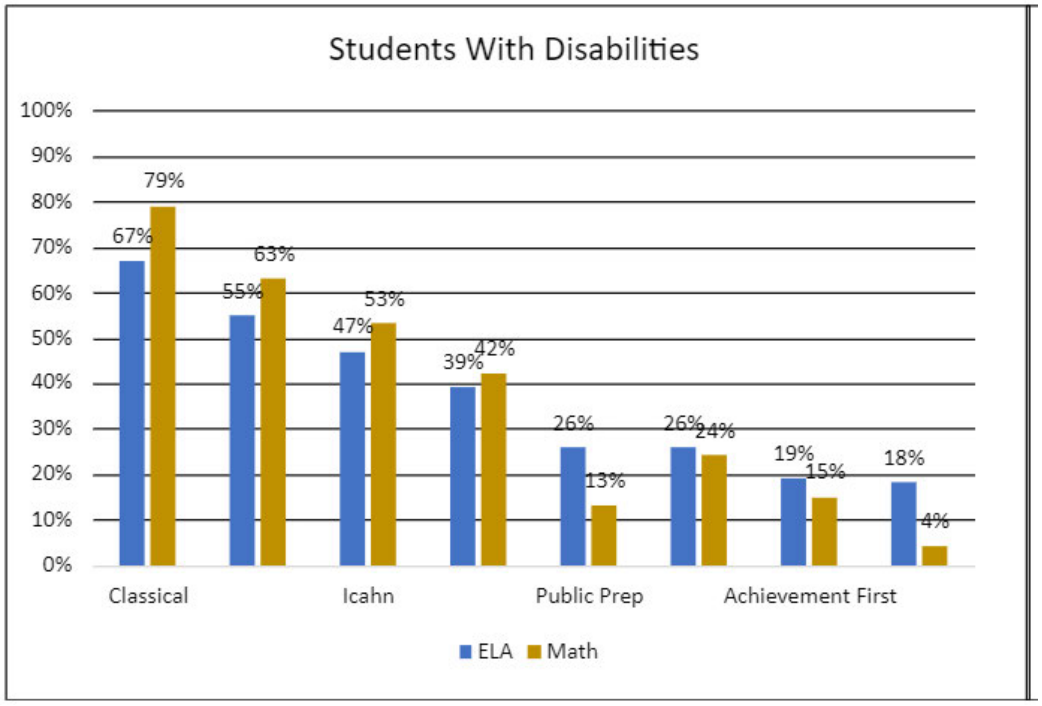
Teachers collaborate around lesson execution each day during their morning Stand Up Meetings. They not only discuss lesson objectives but also strategies for engagement, differentiation, and data collection. All teachers

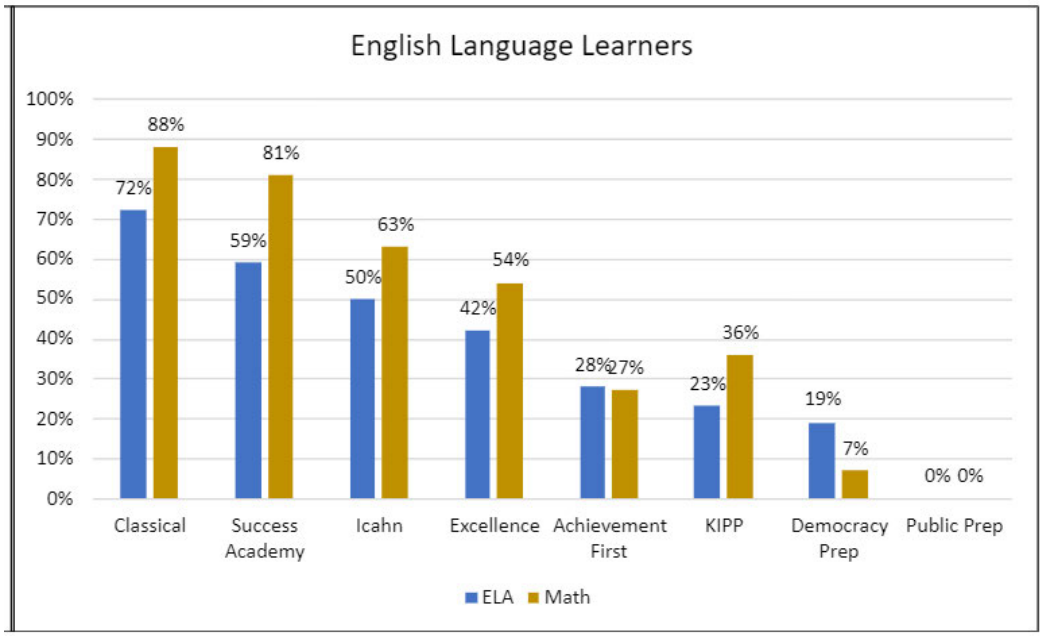
receive support with lesson execution on at least a weekly basis from their Instructional Coach and Grade Team Leader. In addition, teams meet weekly with Instructional Coaches to analyze and discuss data from that week's assessments. The meetings are solutions-oriented, and teachers leave with a clear plan for how to remediate necessary content and how to differentiate for struggling or advanced scholars. This collaboration helps to ensure scholars in each classroom are receiving the same excellent education and that ideas are shared immediately across all classrooms at each grade level.

While the general curriculum remains unified across the schools and is universally used across whole-class instruction, our Scholar Services Team draws on their specific training and scholar-specific knowledge to adapt the curriculum to reinforce, supplement, or even introduce ("pre-teach") content being taught in the whole class during SETSS instruction. Importantly, it is critical for special populations teachers to meet and communicate thoughtfully with general education teachers, focusing on assessment data, behavioral data, and true mastery of the existing curriculum and standards. These meetings occur on an at least weekly basis. In addition, scholar service providers are expected to observe their scholars in the general education setting frequently to evaluate carryover. Scholar service providers also help to develop general educators' knowledge of specific instructional strategies to best instruct scholars with special needs though periodic written feedback and professional development sessions. In addition, all teachers must also know the specific testing accommodations and IEP goals, if any, for all our scholars, and use that information to ensure that all scholars are getting purposeful, appropriately rigorous, and systematically reflective instruction. Scholar service providers partner with general education teachers, instructional leadership, and parents to guarantee that each scholar's needs are met. Scholar service providers also receive high quality monthly professional development to ensure their practices stay current and relevant.

To gain a better sense of need amongst our youngest students, CCS piloted a pre-k summer program over July of 2016, which served primarily ELL and Special Education scholars. Fully 70% of the 36 scholars who attended the program qualified to take the NYSITELL assessment. Additionally, 25% of the 36 scholars came into the program with IEPs. The program ran for three weeks and provided the special student population with additional support to help to ensure that they would be successful in kindergarten.

Notably, CCS scholars demonstrated strong performance on the 2023 New York State 3rd-8th grade State Tests across grades in both ELA and Math. Our average ELA pass rate was 90% and, in Math, 98%, which is significantly higher than the state's averages of 51.7% (ELA) and 49.9% (Math) and the NYC charter school average of 59% (ELA) and 63% (Math). The consistency of performance across our four existing schools and also across grades 3-8 makes us confident that we can continue to exceed achievement indicators towards proficiency and also towards strong high school placement. All our eighth graders secured 100% acceptance to their top three public high school choices. Additionally, scholars received offers from at least one of their preferred charter schools and secured admissions to at least two out of three Catholic high school choices. Numerous scholars were awarded partial or full scholarships to Catholic schools, while two students earned full scholarships to private independent schools. 100% of our 8th grade scholars were accepted into at least 1 of their top 5 schools this year. Additionally, 100% of 4th graders received a score of 4 on the NYS Science Exam and 100% of 8th graders passed the Living Environment Regents; some passed with honors. A tremendous amount of work went into achieving these results, including state test tutoring for scholars in grades 3-8, additional intervention through our At-Risk program, and parent sessions on how they can support their scholars with their academic work at home.





As mentioned previously, SBCCS V will be a replication of SBCCS I, II, III and IV. The practices described above have already served scholars greatly, earning South Bronx Classical Charter School I the 2014 and 2020 Blue Ribbon Award. In addition, South Bronx Classical Charter School II was nominated for the Blue Ribbon Award in December 2018 and South Bronx Classical Charter School III in 2022. For context, about 30 schools won the award in 2014, out of approximately 130,000 public, charter, and private schools across the nation. Notably, the process for determining the Blue Ribbon Award includes progress by special populations.

We believe that we have the human capital, the Core Values, and the Principles of Practice to ensure that SBCCS V will be even more successful than its predecessors. Our focus on student academic performance and character education appears to yield strong results.

b. Assessment System

Describe the diagnostic, formative, and summative assessments the school will use to evaluate student knowledge and skills. This response should:

- Describe each assessment's purpose, design, format, and rationale for its selection;
- Describe key considerations in the selection or creation of any assessments not yet identified including as it relates to ascertaining the impact of student learning loss;
- Describe how the school will collect and analyze assessment results;
- Explain how the school will ensure assessment results are valid and reliable;
- Describe who will be responsible for administering assessments and collecting and analyzing the results;
- Explain how school leaders and teachers will ensure student work products resulting from instruction indicate student preparation for success on state assessments;
- Explain how the following stakeholders will have access to and be able to use assessment results: teachers, school leaders, the education corporation's board of trustees, and students and parents; and
- Describe how the school will inform parents and students about academic achievement and progress including the timing, frequency, and nature of the information.

The strategic use of objective data – criterion-referenced, norm-referenced, interim assessments – will best inform ongoing curriculum development, classroom instruction, and differentiated scholar support. Such assessments demonstrate the value-added benefit of our school program to our scholars' lives. The data collected from all assessments will be analyzed thoughtfully and communicated thoroughly with all stakeholders invested in our scholars' academic growth.

Baseline Data

Since we begin with our youngest students in kindergarten, it is critical that we obtain reliable testing data before the onset of these other standardized assessments, and to ensure that students are making strong progress in the most critical component of classical education-reading. In addition to an internally created intake assessment for kindergarten, all scholars take the Fountas & Pinnell Running Records assessment in August, against which longitudinal growth can be measured by scholars, class, grade, and school. These data points will allow School Directors to demonstrate to stakeholders that scholars are making progress- both in comparison to their own and other comparable groups' baseline scores.

The first internal assessment in reading, writing and mathematics is given upon enrollment. With this information, teachers will inform their curriculum development and lesson planning for the class, as well as the tutoring requirements for individual students. At the end of each year, scholars will be assessed with the same internal tool to measure growth and progress throughout that year.

Ongoing Data

In each grade, scholars are assessed at the conclusion of each unit of study for all subjects. Most often, this takes the form of a unit assessment, which only assesses mastery of content and skills learned in the unit just taught. Unit assessments vary in length and format, depending on grade and subject, but closely align to what scholars are practicing in their daily independent practice across the unit. In all grades, there are Math and ELA interim assessments that are administered 3 times per year, replacing unit assessments and assessing mastery of

cumulative content and skills learned over the course of 2-4 units of study. Our Kindergarten curriculum varies slightly in that interim assessments are only administered 2 times per year, as many of our youngest scholars are acclimating to being in school for the first time and are just learning how to take tests.

TEST	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
K-2 EOY Test											K-2
State Test ELA/Math									3-8		
State Test Science										5, 8	5, 8
Running Records	All	K-2	All	K-2	All	K-2	All	K-2	All	K-2	All

Analyzing Data

During the year, teachers and administrators use the data gathered through unit and interim assessments to drive weekly team meetings and professional development. Data meetings will occur frequently, and as soon as possible after an assessment, to deliver timely and effective instructional changes or interventions in response to the data. Individual scholar scores will give teachers a better understanding of each scholar's current strengths, deficits, and progress towards their academic goals to help identify specific needs for prompt remediation. Class and school-wide scores will give an overall picture of success at teaching State standard content in its pursuit of school-wide accountability, as well as identify specific needs to adjust curriculum and/or instructional practices.

Behavioral Data

More difficult to track and assess is our scholars' progress toward our objective of creating respectful, compassionate, and productive citizens. However, we believe that data can be obtained in this goal, and such data can be profitably analyzed to allow us to refine our practice to achieve this goal. Our Deans of Students will be charged with collecting data on all behavioral infractions, including scholar, teacher, grade, day, time, Character Pillar not followed, and consequence. Such data can be used to assess our progress toward this objective. This monthly data has been collected from our schools since August 2006.

SBCCS V believes that assessment systems will play a particularly critical role in its success. The data such systems provide will inform the Board, Executive Director, and School Directors about the real efficacy of our educational program. SBCCS V will ensure that its curriculum team includes those who will be charged with developing and refining our internal and external assessment requirements and analyzing the resulting data. The proposed Executive Director has successfully created and operated a number of quantitative analysis tools in his years as Executive Director of CCS and also as an investment banker, and he also created and analyzed various assessment tools (such as regression analyses) for strategic analysis in conjunction with Uncommon Schools, Inc., and Doug Lemov, a well-known educational author and researcher.

Test Administration

CCS follows a consistent structure for administering all internal assessments. Before assessments, all relevant signage is removed from the walls, scholars' desks are separated, and the teacher ensures that there is a silent and focused testing environment before administering the assessment. For certain assessments, such as our Practice State Tests, an additional person, typically a support teacher (Learning Specialist or Scholar Services provider), Instructional Coach, or member of the Operations team will also proctor the assessment to ensure complete validity of the testing climate. For those assessments, immediately after the test window is closed, the test will be removed from the classroom and graded. All scores are entered into sophisticated data trackers which allow us to track mastery by question, question type and standard.

Data Collection and Analysis

Once all assessment information and data are collected, it can be "thin-sliced" into various cohorts and levels of granularity that aid all stakeholders in their ability to identify next steps. These levels of granularity include scholar, classroom, teacher, grade, IEP status, ELL status, gender, etc. Teachers have access to the full data set so they have all the information they need to work in concert with instructional leadership to make decisions regarding curricular and instructional next steps. For a more general overview of the school, such data can be "rolled up" for general dissemination. As noted above, specific information regarding scholar performance on all assessments is immediately distributed to families. The Executive Director also updates the board of trustees monthly.

Interim assessments in grades 3-8 are graded by Instructional Coaches with data entered by our Operations team. This allows a more objective approach to scoring open-ended responses and it also provides Instructional Coaches a closer look into how scholars are performing across the year and ahead of State Tests. For other assessments (e.g., unit tests), teachers grade and input their own data into our "Novus" data entry system, which is fastidiously maintained by our Data Team for accuracy and relevancy throughout the year. By analyzing these trackers, everyone at CCS has complete access to the progress made by each scholar and cohort, in addition to having a clear sense for how CCS is doing as a whole. Trackers for all internal assessments across subjects, grades, and schools, are maintained in our internal "Novus" system so they are accessible to all staff both on and off our campuses. Additionally, Classical's Data Team has developed "Data Dashboards" to provide more detailed summaries of scholar academic and behavioral data. These dashboards provide a snapshot into performance but also enable us to drill down to specific filters and look-fors. Lastly, we use an additional app to store reading level data gathered from the Fountas & Pinnell Running Record assessments we administer.

Family Communication

Grade teams are responsible for communicating scholar results to families urgently, and frequently, across the school year. Teachers create formal report cards for their scholars three times per year – in December, March, and June. In December and March, their progress is communicated through formal parent-teacher conferences, and, in June, reports are sent home. Classical emphasizes the importance of communication across the year so that families are not first hearing of a scholar's struggles at their report card meetings. Our teachers are expected to consistently communicate with families and share test results and progress updates at a much greater frequency. Communication methods may vary depending on the teacher or the team, but most often, results are communicated by sending home graded tests with written constructive feedback or by sending messages via Jupiter, our network's family communication system. Teams also use progress reports between report card deadlines to provide a snapshot of each scholar's performance for families. Lastly, our teachers use homework as another means of providing feedback to our scholars and families on areas to prioritize or review.

c. Instructional Methods

Describe the pedagogical approach the school will use to implement its curriculum including:

- The instructional methods or techniques to be employed in the school including any specific requirements for implementing this pedagogical approach (e.g., co-teaching or aides, technology, physical space, approaches to classroom management, etc.);
- Research or existing models that support the use of these instructional methods, especially considering the school's target population and curricular choices outlined in Response 6(a) – Curriculum Selection Process; and,
- An explanation of how the instructional methods align with the school's educational philosophy and further its specific mission, key design elements, and unique themes.

The instructional strategies employed at CCS will also serve as a basis for those proposed at SBCCS V. Our instructional strategies are based on best practices learned by experienced educators, information provided by outside consultants and organizations such as Teachers College Reading and Writing Project. In addition, we lean heavily on instructional practices outlined in *Teach Like A Champion 2.0* and *The Skillful Teacher* by Jon Saphier. Instructional Coaches rely on *The Art of Coaching, Closing the Teaching Gap* and *Coaching Classroom Instruction.* As an organization, we also rely on texts such as *How Children Succeed*, *Visible Learning*, and *Understanding by Design*.

Our instructional strategies evolve as the best practices are refined and adapted by the faculty. Some examples of ways instructional strategies evolved during the 2015-2016 school year include the following: increased focus show calling scholar work, emphasis on structuring partner work effectively to improve small group and whole class discussions, and near daily analysis of scholar work across grade teams to determine specific areas to emphasize in future lessons. Using scholar data, natural variations in teacher style, as well as experimentation help inform next steps in instructional practice.

A core philosophy, particularly with our special student populations (English language learners and Special Education), is that students need to maximize their thinking time around literacy and mathematical concepts. Therefore, students are expected to talk about problems, rather than answering low-level ("thin") questions. Guided Reading, Close Reading, and Number Stories are three extended times where scholars are given multiple opportunities for discourse. These blocks are opportunities to scaffold for struggling scholars and to push advanced learners forward, as the particular texts and questions are modified based on scholar need.

In addition, special student populations receive far more small-group instruction. With our At-Risk Program, scholars who are performing below grade level (regardless of designation) receive an additional 45-50 minutes of Guided Reading in groups of six or fewer. During that time, a variety of instructional strategies are used, mostly around ensuring that scholars maximize their time reading, or thinking about their reading. In addition, struggling scholars have access to two additional programs: Leveled Literacy Intervention (LLI) and Preventing Academic Failure (PAF); teachers at each school site are trained in these well-respected programs.

d. Course or Subject Overview

Provide course descriptions for every subject and grade level the school will serve within the initial five years of operation, accounting for both core and non-core subject areas including all courses identified in Request 7 – Calendar and Schedules and specials (e.g., physical education, art, etc.). This should include, at a minimum:

- A general description of the specific content and skills that would be addressed in the course, if known;
- The curricular programs (e.g., Core Knowledge, Singapore Math, FOSS, etc.) that would be used in each course;
- Essential course-specific assessments (e.g., the state's 3rd – 8th grade assessments/Regents exams, end-of-course portfolios or performances, etc.); and,
- If serving students in grades 9-12, provide an outline of course sequences and credits awarded for course completion that would lead to graduation.

Course Descriptions

From its founding, CCS designed a school model that we believe best meets the needs of our target population, and which is embedded within the guiding framework of a classical education. The key components of a classical education in the early years focus on a core curriculum, the development of strong literacy and numeracy skills, knowledge, and understanding of elementary facts. In addition, scholars starting as young as kindergarten are

exposed to higher-level exploratory thinking and discussion throughout the day, but especially during our 45-minute problem-solving block called Number Stories and in our 40-minute literacy discussion block called Close Reading. In all grades, scholars develop core knowledge in the basic subjects of reading, writing, math, science, and history.

MATHEMATICS

Math (K-8) – Our K-8 math curriculum systematically covers all standards as outlined by the Common Core. Explicitly, the goal at SBCCS is for each student to be fully prepared for pre-algebra and have an introduction to geometry by the fifth grade. Math builds on itself (e.g., addition is repeated counting, multiplication is repeated addition, exponents are repeated multiplication), and a strong foundation in math numeracy is absolutely essential for success in later grades. "The study of Algebra I has been described as the fork in the road--- a decision point- where one direction leads to opportunities and the other direction leads to limited options for education and career choices." Scholars highly skilled in the fundamentals of arithmetic, general numeracy, and pre-algebra will be prepared for demanding middle/secondary schools and colleges. The math curriculum emphasizes procedural fluency, conceptual understanding, an ability to reason logically, and capacity to justify ones thinking through models or verbal explanations.

Number Stories (K-8) – In each Number Stories lesson, scholars creatively solve a rigorous, real life, word problem. During the launch, the teacher shares the story with scholars in an embellished way that engages the scholars and the teacher assesses comprehension prior to sending scholars off to solve. As scholars are solving the problem, teachers are actively circulating and conferring to determine which scholars should share during the discourse portion of the block. For the last 20 minutes of the block, scholars are expected to thoughtfully share their strategies and through discourse with their peers, work to come up with a math conjecture. While scholars are sharing their strategies, the teacher is charting the strategies which scholars can then reference in future lessons to solve future problem types.

Number Routines (K-5)- During the Number Routines block, scholars are given about 15-20 minutes to grapple with a routine, like counting jar, count around the room, true false number sentences or number strings. Number Routines supports our scholars' development of numeracy, promotes flexbility with computational strategies, develops efficient mental math strategies, and encourages scholars to invent algorithms to support the individual needs of mathematicians. Number Routines is discussion based so that scholars have the opportunity to learn from one another.

ENGLISH LANGUAGE ARTS

Phonics (K-1) – The phonics curriculum was adapted from the *Words Their Way* scope and sequence guide for word study and shaped with the Common Core Reading Foundational Standards. Starting with consonants and progressing through r-controlled vowels and diphthongs, the most fundamental patterns and skills are included in the objective calendar. There is also an emphasis on phonological awareness in the launch of each lesson to help build students' foundation for literacy. Instruction will progress systematically according to the sequence guide, and teachers follow a scripted daily lesson plan.

Grammar (3-8) – Developing our scholars' expressive language via writing and oral language is particularly critical with our target population. Our grammar curriculum covers everything from parts of speech to verb moods. Skills are determined based on the Language standards reflected in the Common Core as well as an understanding of grade-level writing expectations. Formerly, grammar was taught as its own lesson block in 1st and 2nd grades;

however, it is now embedded into the writing curriculum. In our ongoing curricular revisions, grammar instruction will be incorporated into writing for grades 3-8 as well, thus removing grammar as a standalone lesson block and, instead, introducing the skills in a way that promotes immediate application.

Writing (K-8) – Scholars receive explicit writing instruction that reflects the Common Core Learning Standards. Instruction is thematic in nature, covering everything from realistic fiction to non-fiction research-based articles and extended summary reports in the upper grades. Scholars develop writing skills that reflect essential reading skills to ensure bolstering and transfer of these skills. The structure of our writing block reflects Lucy Caulkin's Writing Workshop in the sense that it includes an extended period of work time during which the teacher confers with individual writers to provide differentiated feedback and support.

Read Aloud (K-4) – Reading aloud to scholars builds many foundational skills, introduces vocabulary, provides a model of expressive, fluent reading, and exposes scholars to complex texts that are beyond their decoding ability but within their comprehension ability. Our Read Aloud curriculum is scripted to ensure inclusion of reading comprehension, listening, and expressive language Common Core Learning Standards.

Reading (5-8) – As scholars move into upper elementary and middle school grades, the read aloud block is replaced by reading. Reading lessons are centered on a shared text, portions of which scholars read as preparation for each daily lesson. Scholars spend the majority of their time in the lesson focused on discussing and writing about key concepts present in the texts. The texts chosen for the curriculum meet or exceed grade-level reading expectations and cover all genres required by the Common Core standards.

Guided Reading (K-6) – For one hour each day, scholars receive guided reading, which consists of small-group reading instruction, independent reading, and scholar-run reading centers. Teachers thoughtfully group scholars according to reading level, strengths and deficits, and tailor instruction and center activities to systematically fill skill gaps. Reading levels are assessed using *Fountas and Pinnell's Benchmark Assessment System.* For scholars in 7th and 8th grades who have not yet reached the expected reading level, guided reading is offered as an intervention.

Close Reading (K-6)- Grade teams are responsible for thoughtfully planning (with support from instructional coaches) data-driven close reading instruction that teaches transferrable approaches and thinking routines relating to varied genres and allows for deep scholar discussion and debate. Close reading was first introduced during the 2015-2016 school year. It tremendously impacts a scholar's ability to read and thoughtfully respond to complex text as evidenced by our improved test scores across grades 3-8 on the NYS ELA Assessments.

Textual Analysis (3-8) – The purpose of our TA block is to develop strategic readers who follow a consistent procedure that reflects the text's genre. Scholars are taught how to approach different types of texts, and practice strategies like "genre-based thinking jobs" and "left and right side annotations." Textual analysis instruction helps scholars apply their strong reading skills to short passages and test-type questions.

CONTENT SUBJECTS

Science (K-8) – Based on *Next Generation Science Standards,* our science curriculum is almost entirely hands on, and scholars learn basic physics, chemistry, and biology through experiments and natural observations. The scientific method is discovered by repetition, and safety is explicitly taught. Scholars categorize their findings as typically described (e.g., the periodic table and the biological classifications), and learn the history of science through replicating simple classic experiments.

History (K-8) – History will be taught chronologically and across cultures. Ancient Egypt, Ancient Greece, the Roman Empire, the Chinese Dynasties, and the African tribal cultures are all part of this curriculum. This classical curriculum will bring the discoveries and wonders and genius of parts of the globe together, recognizing the rich contributions of all peoples. Through our classical history curriculum, we aim to develop our scholars' critical thinking, emotional maturity and tolerance, as well as their ability to respectfully, persuasively and articulately express opinions. The content of this block is based on Core Knowledge and NYS Social Studies Framework and addresses the standards and historical thinking skills outlined by the city and state.

Latin (3-8)- The language-rich curriculum of a classical education is further supported through the careful study of Latin, which helps scholars improve scholars' English grammar and vocabulary skills as well as learn other languages. Latin's beneficial effect on scholars' verbal aptitude is well-documented: The increased level of literacy is highlighted on the Scholastic Aptitude Test (SAT), documented in studies by LaFleur (1981, 1982), and is reported in articles by Barrett (1996). Tests conducted by the Educational Testing Service (ETS) from 1988 to 1997 show that scholars studying Latin outperform all others on the verbal portion of the SAT.

Debate (4-8)- Debate at Classical begins in 4th grade and continues through 8th. In 4th-6th grades the focus is on the history of debate, the basics of argument development, and the best practices of public speaking. Scholars do a combination of reading, writing, video analysis, and speech delivery to access the content. In 7th grade, scholars focus their work on Parliamentary Debate, which emphasizes sophisticated argument development, responsive argumentation, and the ability to deliver a speech with minimal preparation through a reliance on strong speaking skills. In 8th grade, the focus shifts to Policy Debate, which requires in-depth research and an ability to string together multiple sources to create a cogent argument. On the whole, the debate program prepares scholars to be competent consumers of nonfiction and media sources, good writers who can state and defend a comprehensive claim, and strong public speakers who speak clearly, directly, and with passion.

e. Promotion and Graduation Policy

Explain the school's policies for promoting students from one grade to the next including specific descriptions of the academic and nonacademic criteria the school will consider in making promotion decisions, including early promotion. Address when and how the school will inform students and parents about promotion and graduation policies and decisions. If the school will offer high school grades within the proposed charter term:

- Describe the types of diplomas the school will offer along with the credit and other requirements for each in accordance with NYSED guidance;
- Explain how students will meet the requirements set forth by New York State for the granting of each relevant type of diploma; and,
- Include a description of any additional specific graduation requirements and the rationale for their selection.

Consistent with its mission, SBCCS V acknowledges the great challenges our scholars face upon entering school, but also the requirement that they must demonstrate proficiency in core subjects to move successfully from grade to grade. Our educational program includes several daily and weekly supports throughout the year to ensure all scholars have a full opportunity to master the material: daily after-school homework help, daily small-group "reteach" blocks and, Summer Learning Academy. Our assessment system ensures that scholars' deficiencies and strengths are evidenced quickly, so proposer remediation can occur.

For promotion, scholars must

- pass all core subjects as evidenced by a 70% year-end average in each subject;
- in Kindergarten to 2nd grade, pass our Common Core-aligned Internal Assessment;
- in 3rd to 8th grade, achieve a '3' or a '4' on the relevant Common Core aligned New York State ELA and Math tests, and the relevant New York State Science tests;
- pass the related end of year Fountas & Pinnell Reading Level Assessment;
- have no more than 15 days unexcused absences during the school year; and
- demonstrate growth in consistently displaying the character pillars

If a scholar fails a core subject, or does not demonstrate proficiency or mastery on required State exams, the scholar must attend Summer Learning Academy for the opportunity to be promoted to the next grade level. Teachers are included in all conversations regarding retention to ensure validity of all decisions. Families receive immediate phone calls and letters for all scholar absences, and a meeting with parents will be arranged when the scholar is within three absences of the promotion limit.

The CCS educational program, curriculum, and assessments are Common Core-aligned, and therefore all academic promotion standards relate directly to the Common Core Learning Standards as adopted by New York State.

Summer Learning Academy

The last opportunity for support and demonstration of academic achievement is during the summer. Scholars who fail a core subject or a required State exam will attend a 3-week summer program from 8:30am – 1:00pm from Monday to Friday starting on the next Monday after the end of the regular school year. Scholars must pass a subject-specific minimum competency test (or go up one reading level) at the conclusion of summer school to be promoted. If the scholar does not, he/she will be retained. Again, teachers are involved in all promotion conversations.

In addition, as a service to parents, we offer After Summer Learning Academy from 1pm to 5pm to allow parents to bring their children to SLA without affecting their work schedules. This has proven to be highly appreciated by our parents.

f. Programmatic Audits

Describe a plan for annual programmatic audits of the implementation and effectiveness of the school's education program. Programmatic audits should include an evaluation of the effectiveness of the school's academic program, governance, and operations. Note that the programmatic audit is not simply a cost/benefit audit as conducted by some school districts. The plan should include, but is not limited to, the:

- Purpose and objectives;
- Areas to be audited;
- Schedule of events;
- Responsible persons, who may include outside consultants;
- Description of the written end product; and,
- How and to whom such written end product will be disseminated.

SBCCS V will operate with continuous self-assessment and evaluation across departments to ensure that its education program runs effectively. This includes execution of curriculum, implementation of best practices for classroom management and engagement, efficiency of departments, and effectiveness of school leaders – to name a few.

Our Curriculum & Instruction team uses a Curricular Audit tri-annually to collect feedback on ways in which the curriculum can improve in a range of areas including Diversity, Equity, and Inclusion, clarity for scholars, etc. Feedback is shared by a range of educators working with the curriculum and is funneled through Grade Team Leaders and Grade Level Vetters (Instructional Coaches with a specialized focus in one grade level's curriculum). Once recommendations are reviewed, they may be approved, modified, or deferred, but most often changes are implemented readily into our curriculum to improve it for the next year. Changes are made by the Curriculum Team and/or Instructional Coaches over the summer and during the school year.

Additionally, our staff receive School Surveys to provide feedback across departments and about the daily operations of the school buildings. Team leaders (managers, Instructional Coaches, School Directors) also elicit upward feedback through surveys and create space for 1:1 meetings with staff they work closely with.

Once feedback is received and digested, an action plan is put into place by the department head or team leader, and communication is shared outwardly about what changes will be made moving forward.

R-06g – Accountability Plan

g. Draft Accountability Plan

Complete the Accountability Plan Template available on the Institute's website. The web page includes additional details to assist the applicant in drafting the required SUNY Accountability Plan. This response should serve as a draft based on the applicant's understanding of the Institute's accountability requirements and align with the proposed school model. Institute staff will work with successful applicants in the school's first year of operation to finalize the plan.

NOTE: Much of the Institute's Accountability Plan template centers on the results of annual state exams. The Institute encourages applicants to consider additional means of accountability and be prepared to discuss them if invited to participate in an interview.

Information for Replicators

- If any elements of the curriculum and instructional design laid out in response 6(a-f) will be different from the original school, specifically describe the changes and rationale.

What to Submit:

- Submit the response to Request 6(a-f) as a Microsoft Word® file named: R-06af- Curriculum and Instruction. This response may not exceed 50 pages in length.
- Attach a draft accountability plan as a Microsoft Word® file named: R-06g- Accountability Plan.

Accountability Plan Template
SUNY Authorized Charter Schools

For schools enrolling students in grades Kindergarten - 8

This Accountability Plan template for schools enrolling students in Kindergarten – 8th grades outlines to the required Accountability Plan goals and measures in place since 2013 and revised in 2018 to incorporate the state's ESSA accountability system.

Sections highlighted in yellow indicate where to insert information to complete the Accountability Plan. Some yellow highlighted sections provide space for the inclusion of additional academic or organizational goals and measures. It is not required that schools include additional goals. For further discussion, or for a detailed explanation of the goals and measures included in this template and required of all SUNY authorized charter schools, refer to the *Guidelines for Creating an Accountability Plan*, revised July, 2019.

South Bronx Classical Charter School V
Accountability Plan
for the Accountability Period 2025-26 TO 2029-2030

ACADEMIC GOALS

GOAL I: ENGLISH LANGUAGE ARTS

Goals:

(a)	80% of all scholars who have been enrolled at SBCCS V for 2 full academic years or more will score at Level 3 or higher on the State English Language Arts Test (ELA)
(b)	the SBCCS V average score on the ELA will exceed the average score of its home district and of the City as a whole, for each grade
(c)	beginning in grade 2, each cohort of scholars will improve its literacy score by of 3 percentiles per year, as measured by internal assessments or State Test

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the state's English language arts exam for grades 3-8.
- Each year, the school's aggregate Performance Index[1] ("PI") on the state English language arts exam will meet that year's state Measure of Interim Progress ("MIP") set forth in the state's ESSA accountability system.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state English language arts exam will be greater than that of students in the same tested grades in the local school district.
- Each year, the school will exceed its predicted level of performance on the state English language arts exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for the enrollment of economically disadvantaged students among all public schools in New York State.

Growth Measure

- Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in English language arts for all tested students in 4^{th} – 8^{th} grades will be above the target of 50.

GOAL II: MATHEMATICS

Goals:

(a)	80% of all scholars who have been enrolled at SBCCS V for 2 full academic years or more will score at Level 3 or higher on the State Mathematics Test
(b)	the SBCCS V average score on the State Mathematics Test will exceed the average score of its home district and of the City as a whole, for each grade
(c)	beginning in grade 2, each cohort of scholars will improve its average math score by 3 percentiles per year, as measured by the internal assessments or State Test

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the New York State mathematics exam for grades 3-8.
- Each year, the school's aggregate PI on the state mathematics exam will meet that year's state MIP set forth in the state's ESSA accountability system.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state mathematics exam will be greater than that of students in the same tested grades in the local school district.
- Each year, the school will exceed its predicted level of performance on the state mathematics exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for the enrollment of economically disadvantaged students among all public schools in New York State.

Growth Measure

- Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in mathematics for all tested students in 4^{th} – 8^{th} grades will be above the target of 50.

GOAL III: SCIENCE

Goals:

(a)	60% of all fifth grade scholars who have been enrolled at SBCCS V for 2 full academic years or more will score at Level 3 or higher on the State Science Test
(b)	60% of all eighth grade scholars who have been enrolled at SBCCS V for 2 full academic years or more will score at Level 3 or higher on the State Science Test or Learning Environment Regents Exam.

Absolute Measures

- Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at or above proficiency on the New York State science exam.

Comparative Measures

- Each year, the percent of all tested students who are enrolled in at least their second year and performing at or above proficiency on the state science exam will be greater than that of students in the same tested grades in the local school district.

GOAL IV: ESSA

Goal: The school will remain in good standing according to the state's ESSA accountability system.

Absolute Measure

- Under the state's ESSA accountability system, the school is in good standing: the state has not identified the school as being in need of comprehensive or targeted assistance.

ORGANIZATIONAL AND OTHER NON-ACADEMIC GOALS

GOAL VI: OPTIONAL NON-ACADEMIC STUDENT GOAL(S)

Goal: SBCCS V will demonstrate strong annual attendance and enrollment.

(a)	The average daily attendance rate will meet or exceed 95% each year
(b)	The SBCCS V waiting list will exceed 1.5 applications per available seat
(c)	SBCCS V will retain its scholars at an annual rate of 90% or more

GOAL VIII: OPTIONAL ORGANIZATIONAL GOAL(S)

Goal: SBCCS V will demonstrate fiduciary responsibility in managing public and private resources.

(a)	SBCCS V will use Generally Accepted Accounting Practices (GAAP) independently verified through an annual external audit
(b)	SBCCS V will produce financial reports demonstrating fiscal transparency and sound financial standing

Goal: SBCCS V will provide scholars with a safe learning environment with strong communication on scholar achievement between home and school.

(a)	85% of SBCCS V parents through the NYC Department of Education's Learning Environment Survey will consider SBCCS V a "safe" school
(b)	85% of SBCCS V parents through the NYC Department of Education's Learning Environment Survey will indicate strong communication between school and home regarding scholar achievement

R-07ac – Calendar and Schedules

a. School Calendar

Provide a copy of the school's proposed calendar for its first year of operation that clearly articulates the following, and which demonstrates compliance with New York State requirements for minimum instructional hours, which all schools must provide:

- Total number of days of instruction for the school year including whole and half days;
- Total number of hours of instruction for the school year including and not including additional instructional time outside school hours such as tutoring;
- First and last day of classes;
- Organization of the school year (i.e., semesters, trimesters, quarters, etc.);
- All planned holidays and other days off, as well as planned half days; and,
- Dates for summer school, orientation, and other activities outside of the core academic calendar, if planned. Provide a narrative to explain any aspects of the calendar that are not evident on the first year calendar or where further explanation is necessary.

Our calendar (see attached calendar) reflects our deep belief that more time learning in the core subjects is critical for scholar success, particularly in the communities we hope to serve. Therefore, SBCCS V scholars will enjoy an extended school day and extended school year, providing more core instructional time over the course of the year than traditional public schools.

CLASSICAL
CHARTER SCHOOLS

August 2025

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2025

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October 2025

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November 2026

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2026

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2026

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February 2026

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2026

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2026

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2026

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July 2026

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

The 2025-2026 school year has 193 school days and is divided into trimesters (deliniated by the first Fridays in December and March). Each day is 7.5 hours of instruction. Diagonal lines indicate 1pm dismissal days.

HOLIDAYS

August 20	First Day of School	November 4	Election Day	Feb 16 – 20	Mid- Winter Recess
September 1	Labor Day	November 11	Veterans Day	Apr. 3 – 10	Spring Recess
Sept 25 and 26	Rosh Hashanah	Nov. 27-28	Thanksgiving	May 25	Memorial Day
October 13	Columbus Day	Dec. 24 – Jan 2	Winter Recess	June 4	Chancellor's Day
		January 19	MLK Jr. Day	June 26	Last Day

b. Sample Student Schedule

For each division of the school (e.g., lower elementary, upper elementary, middle, high) provide the following for a typical week of instruction:

- A narrative describing the typical school day (including the approximate start and dismissal times and any regular variations; for example, one day a week early dismissal for teacher professional development), components of the school day devoted to core academics; components of the school day devoted to before or after school electives; and, remediation or other non-core academic components of the proposed school design;
- A table that clearly identifies the minimum number of weekly minutes the school will devote to individual core academic subjects in each grade (e.g., ELA, mathematics, science, and social studies), and the total number of instructional minutes the school would offer per week (exclusive of lunch, recess, study hall, etc.); and,
- A sample student schedule for a typical week.

Student's Day and Year

All students arrive at CCS schools between 7:20 and 7:50 am. They are greeted by the Dean of Students and then directed to the cafeteria for breakfast. At 7:50, students are escorted upstairs by their teachers to start their day of instruction, with the first instructional block beginning at 8:00 am.

As a planned K-8, all scholars receive the same curriculum, with no electives. Core classes include Reading, Writing, Math, Guided Reading, Science, and Social Studies. Non-core classes might include Fitness, Art, and Music; however, a Classical Education sees all these subjects as worthy and deserving of “Core” class status. In addition, all scholars receive 45 minutes of Character Education with their Dean once per week. Our daily schedule (see excerpt from First Grade) shows evidence of our commitment to provide over 180 minutes of daily literacy instruction and over 100 minutes of daily math instruction.

Also, from our experience, after-school support is an important part of the life of the school, to support struggling scholars, challenge advanced scholars, and provide additional engaging activities for those who wish to be involved in extracurriculars. Some of the more recent extracurricular activities our teachers have offered include theater, dance, and basketball. Clubs are hosted three times a year, with a minimum of 5 weeks per round. Therefore, the first dismissal for students will be at 4:30 pm and for those who choose to stay, a number of structured supports remain in place until 5:30 pm.

Finally, each month ends with a Community Gathering, during which we honor scholar successes, from displays of virtuous character to high achievement on assessments. All SBCCS V stakeholders are always welcome and invited to these rituals and enjoy these Friday celebrations of school life and success.

Sample 1st Grade Scholar Schedule:

Time	1st Grade (Queens Classroom)	Minutes
7:45 - 8:00	Arrival / Morning Meeting	15
8:00 - 8:40	Read Aloud	40
8:40 - 8:50	Bathroom	10
8:50 - 9:35	Specials	45
9:35 - 10:15	Math	40
10:15 - 10:45	Lunch	30
10:45 - 11:25	Number Stories / Reteach	40
11:25 - 11:35	Bathroom	10
11:35 - 11:55	Phonics	20
11:55 - 12:15	Number Routines	20
12:15 - 1:00	Specials	45
1:00 - 1:20	Recess	20
1:20 - 2:20	Guided Reading	60
2:20 - 2:30	Snack	10
2:30 - 2:40	Bathroom	10
2:40 - 3:40	Writing	60
3:40 - 4:20	Social Studies / Science	40
4:20 - 4:25	Pack Up	5
4:25 - 4:45	Dismissal	20
Room #	**418**	540

c. Sample Teacher Schedule

For each division of the school, provide a sample teacher schedule for a typical week of instruction including:

- Length of teachers' workday; and,
- Time devoted to core teaching assignments, planning, and other activities.

What to Submit:

- Submit the response to Request 7 as a Word® file named: R-07ac- Calendar and Schedules.

Teachers' days typically begin with daily team Stand Up meetings. In each grade, Grade Team Leaders will hold Stand Up meetings at 7:30am. These 15 minutes allow teams to discuss operational anomalies such as absences, changed schedules, or testing, but also more lesson-specific discussions such as anticipated scholar difficulties, groupings, and last-minute tips and advice. Instructional Coaches and Deans circulate among the grades during this time. Special Education teachers and providers attend the team meetings a few days per week to gain a better sense of curriculum and grade-wide priorities across the school and facilitate their own meetings on the other days.

Classroom teachers pick up their scholars at about 7:50 am, and instruction begins at 8:00 am. Generally, teachers teach from 8 to 4:30 pm. During that time, teachers receive a 30-minute lunch break, and 2 50-minute preparation periods. Often, however, teachers will pull a small group of their scholars for part of a preparation period. Teachers dismiss their scholars at about 4:15pm, and can either leave at 4:30 pm, or return into the building to work. On average, our teachers will report to work at 7:15 am and leave the building at 4:45 pm.

The CCS School Year begins with new staff reporting for Professional Development on the first Wednesday in August. For three days, new staff receive general discussion about the school's history, results, professional expectations, core values, and principles of practice. Starting on the second Monday in August, all staff (new and returning) attend seven days of Professional Development, as discussed above. Scholars report to school on the third Wednesday in August.

During the year, CCS uses a trimester system, with Trimester 1 spanning from mid-August to early December, Trimester 2 spanning from early December to early March, and Trimester 3 spanning from early March to the end of June. All students are dismissed at 1pm on the first Friday of the month. After Trimesters 1 and 2, Report Card Conferences are held during the half days in December and in March. At the end of the year, report cards are mailed home. In the other months, from 1 pm to 4:30 pm, all staff receive Professional Development as discussed above.

As mentioned above, CCS offers a Summer Learning Academy, which begins on the first Monday in July and lasts for 3 weeks. SLA is either recommended or required for scholars. SLA lasts from 8 am to 1 pm. New to Classical is an After Summer Learning Academy program, which offers scholars other activities from 1 pm to 4:30, as a service to parents who would have difficulty picking up their children after SLA.

Time	K GTL (Parada)	Instructional Minutes	Prep Min.
7:45 - 8:05	Arrival / Morning Meeting	20	
8:05 - 8:20	Prep		15
8:20 - 8:30	Bathroom	10	
8:30 - 9:05	Math	35	
9:05 - 9:35	Prep		30
9:35 - 10:20	Prep		45
10:20 - 10:45	Recess	25	
10:45 - 11:15	Lunch		
11:15 - 11:25	Bathroom	10	
11:25 - 11:55	Writing	30	
11:55 - 12:30	Read Aloud	35	
12:30 - 12:45	Support ELA Reteach	15	
12:45 - 1:45	Guided Reading	60	
1:45 - 2:30	Intervention	45	
2:30 - 2:40	Bathroom	10	
2:40 - 2:50	Snack	10	
2:50 - 3:20	Phonics	30	
3:20 - 3:50	Prep		30
3:50 - 4:20	Prep		30
4:20 - 4:25	Pack Up	5	
4:25 - 4:45	Dismissal	20	
	Total	360	150

Time	K Lead (Blount)	Instructional Minutes	Prep Min.
7:45 - 8:05	Arrival / Morning Meeting	20	
8:05 - 8:20	Number Routines	15	
8:20 - 8:55	Math	35	
8:55 - 9:05	Bathroom	10	
9:05 - 9:35	Close Reading	30	
9:35 - 10:20	Prep		45
10:20 - 10:45	Recess	25	
10:45 - 11:15	Lunch		
11:15 - 11:45	Prep		30
11:45 - 11:55	Prep		10
11:55 - 12:30	Read Aloud	35	
12:30 - 12:45	Prep		15
12:45 - 1:45	Guided Reading	60	
1:45 - 2:30	Intervention	45	
2:30 - 2:40	Snack	10	
2:40 - 2:50	Bathroom	10	
2:50 - 3:20	Phonics	30	
3:20 - 3:50	Number Stories / Reteach	30	
3:50 - 4:20	Social Studies / Science	30	
4:20 - 4:25	Pack Up	5	
4:25 - 4:45	Dismissal	20	
	Total	410	100

Time	3rd Lead (Siu)	Instructional Minutes	Prep Min.
7:45 - 8:05	RR	20	
8:05 - 8:15	Bathroom	10	
8:15 - 8:35	Prep		20
8:35 - 9:25	Math	50	
9:25 - 10:15	Textual Analysis	50	
10:15 - 10:45	Lunch		
10:45 - 11:30	Prep		45
11:30 - 12:25	Guided Reading	55	
12:25 - 1:00	Number Stories / Reteach	35	
1:00 - 1:45	Intervention	45	
1:45 - 2:05	Recess	20	
2:05 - 2:15	Bathroom	10	
2:15 - 2:50	Prep		35
2:50 - 3:00	Snack	10	
3:00 - 3:40	Read Aloud	40	
3:40 - 4:20	Writing	40	
4:20 - 4:25	Pack Up	5	
4:25 - 4:45	Dismissal	20	
	Total	**410**	**100**

Time	4th-5th MGLS (Thompson)	Instructional Minutes	Prep Min.
7:45 - 8:05	Support Arrival (4)	20	
8:05 - 8:20	Grammar (4 - Kenyon)	15	
8:20 - 9:05	Support Math (4 – UChicago)	45	
9:05 - 9:50	Prep		45
9:50 - 10:20	History (4 - CBU)	30	
10:20 - 10:45	Lunch		
10:45 - 11:30	Intervention (3)	45	
11:30 - 11:35	Prep		5
11:35 - 11:55	Guided Reading (5)	20	
11:55 - 12:40	Support Read Aloud (4 – UChicago)	45	
12:40 - 1:20	Prep		40
1:20 - 2:20	Guided Reading (4)	60	
2:20 - 2:30	Snack (4 - UChicago)	10	
2:30 - 3:15	Intervention (5)	45	
3:15 - 4:20	Prep		65
4:20 - 4:25	Support Pack Up (4)	5	
4:25 - 4:45	Support Dismissal (4)	20	
	Total	**360**	**155**

Time	Middle School 7th Grade ELA Teacher (Brown)	Classroom	Instructional Min	Non-Inst. Min	Prep Min.
7:45 - 8:05	Arrival / Morning Meeting	Old Dominion		20	
8:05 - 8:55	Reading	Old Dominion	50		
8:55 - 9:45	Reading	Georgia	50		
9:45-10:15	Prep	-			30
10:15-10:30	Grammar	Georgia	15		
10:30 - 10:45	Prep	-			15
10:45 - 11:15	Lunch	-			
11:15 - 12:25	Prep	-			70
12:25 - 12:40	Grammar	Old Dominion	15		
12:40 - 1:25	Prep	-			45
1:25 - 1:45	Recess	-		20	
1:45 - 2:30	Writing	Old Dominion	45		
2:30 - 3:15	Writing	Georgia	45		
3:15 - 4:00	Intervention	-	45		
4:00 - 4:20	Study Hall / Pack Up	Old Dominion		20	
4:20 - 4:45	Dismissal	Old Dominion		25	
		Total	265	85	160

R-08ad – Specific Populations

Responses to Request 8 should reference and address the needs of the school's target population and demonstrate a detailed understanding of the population of students to be served, as well as the fit between the proposed school design and the specific at-risk students the school seeks to serve. Responses should demonstrate an understanding of legal requirements and also articulate a clear theory of action as to how the school will meet the needs of at-risk students in a way that reflects the proposed school design, curricula, and personnel.

a. Struggling Students

Discuss the school's methods and strategies for identifying and serving students who are struggling academically and at risk of academic failure including:

- How the school will determine and identify which students are struggling including within the context of a Response to Intervention ("RTI") program. The applicant should clearly define the term "struggling student" as it would be applied in the school;
- The strategies, programs, specific curricula, and resources (including personnel) the school will devote to assisting struggling students both within general education classrooms and in other settings (e.g., planning time, small group instruction, tutoring, targeted assistance, technology, staff, and consultants, etc.);
- Any research or evidence that supports the appropriateness of the proposed approach; and,
- The process that the school will use to evaluate the efficacy of the program and ensure that the school is meeting the needs of these students.

SBCCS V will prioritize data collection and analysis systems to gather information about scholars' academic progress and urgently identify scholars struggling academically or at risk of academic failure or retention. These systems are already designed and implemented at the other CCS sites and will be readily accessible for use with SBCCS V. Data collected from unit and interim assessments, running records, quizzes, and other informal methods (e.g., daily independent practice, homework) will be utilized to keep a pulse on how our scholars are performing across the year.

We have built in structured intervention time within our schedule to serve our at-risk scholars. Classroom teachers, as well as Learning Specialists and Multi-Grade Learning Specialists, play a vital role in providing intervention services to scholars. Intervention groups meet for 35-45 minutes daily- and typically contain no more than 5-6 scholars at a time. The groups have more time to practice targeted skills aligned to their academic goals and receive in-the-moment feedback from their teacher. The efficacy of this time is largely up to the teacher leading intervention; however, we provide high-quality intervention lesson plans and materials, created in-house, for our teachers to select from as they prepare for their groups.

b. Students with Disabilities

Discuss the school's methods and strategies for identifying and serving students with disabilities in compliance with all federal laws and regulations. Please refer to Appendix B – Assurances Regarding the Provision of Special Education Services when creating this response as, if approved, the final charter will incorporate the assurances found in this document. The Institute strongly recommends that applicants refer to NYSED's Guidance on Charter Schools and Special Education in developing responses.

This response must include:

- A statement agreeing to abide by all of the assurances found in Appendix B of this RFP – Special Education Assurances;
- Discussion of the relationship between the school and the district Committee on Special Education ("CSE");
- The process for identifying students with disabilities (child find), especially within the context of the school's RTI process;
- The resources, personnel (including administrative responsibilities), and direct and related services the school is likely to provide both within general education classrooms and in other settings (e.g., collaborative team teaching ("CTT"), Special Education Teacher Support Services ("SETSS"), speech therapy, physical therapy, occupational therapy, counseling, planning time, instructional materials, technology, professional development, staff and consultants, etc.) and a brief discussion about how specifically the school would ensure that students entitled to these services would continue to receive them in a remote setting;
- The services or settings that will be provided by the school district of the student's residency or through a third-party contract (pursuant to the Act);
- Any research or evidence that supports the appropriateness of the school's approach to serving students with disabilities;
- The process for coordination between general education teachers and special education teachers and service providers;
- The process that will be used to monitor the achievement and progress of students with disabilities in the general context of the program in addition to the goals and objectives provided in the student's IEP;
- Specific professional development provided to the instructional staff for identifying, supporting, and evaluating the progress of special education students including the implementation of RTI and behavioral intervention plans ("BIPs") in the classroom; and,

- The process that will be used to evaluate the efficacy of the program and ensure that the needs of these students are being met.

The Founding Board of SBCCS V and CCS believes that all scholars, regardless of demographics, language, or disability, can achieve at high levels through a highly structured, disciplined environment in which expectations are clear and supports are ample. Therefore, we have structured our program to ensure that ELLs, scholars with Individualized Education Plans (IEPs), and scholars who qualify for Free and Reduced Price Lunches (FRPL) will be proficient readers, writers, and speakers of English by the beginning of the third grade.

Least Restrictive Environment and Free and Appropriate Public Education

SBCCS V will ensure that all scholars with disabilities receive a free and appropriate public education in the least restrictive environment possible. Therefore, to the greatest degree possible in accordance with their Individualized Education Plan (IEP), scholars with disabilities will be educated within the regular education classroom. Students With Disabilities will be educated outside their classroom only when the severity of disability prohibits adequate academic progress even with supplementary aids and services. In order to ensure that all Students With Disabilities are able to reach the school's academic goals, we will work with the local school district Committee on Special Education (CSE) to ensure that all required services are provided under federal special education laws. Students With Disabilities will be provided with the same services, notices, and access to school sponsored programs and activities as provided to general education students, including appropriate and timely progress reports.

Special Education Methods and Strategies

In accordance with the requirements of the Individuals with Disabilities Education Act (IDEA) and in compliance with Child Find requirements (34 CFR §300.125) SBCCS V will have processes to identify, locate, and evaluate Students With Disabilities.

Upon enrollment, and with the support of families and sending school districts, we will

- secure all incoming student records, including all Individual Education Plans (IEPs);
- work with the relevant CSE as scholars on pre-existing IEPs transition to SBCCS V;
- work as needed with the CSE to suggest modification to any pre-existing IEPs;
- cooperate with the CSE to ensure that all services identified on the IEP are provided;
- prefer using in-house special education staff to provide specialized instruction, but may contract out other services (i.e. counseling, speech and language therapy, occupational therapy, physical therapy) to the local sending district or a well-qualified third party.

For students enrolling, without an IEP, and whom the school suspects of having a disability, SBCCS V will

- enter into a tiered RTI-like system with parent permission. This will lead to SST providing classroom strategies and support. If progress is limited or at a reduced rate, a CSE referral will follow.
- implement classroom strategies, decided upon by SBCCS V's Special Services Team (Special Education Coordinator, Dean of Students, Speech Pathologist, and School Psychologist) in collaboration with classroom teachers, to address academic difficulties;
    - if strategies are unsuccessful, our Special Education Coordinator will (a) notify the family in writing to consider referring the child to the sending district's CSE and ensure that the family is also provided a copy of the referral and all safeguard notices as set forth in 34 CFR §300.504; and (b) refer the student to the appropriate district's CSE which then has the responsibility of conducting an initial evaluation and determining, with appropriate school representation, Special Education (SPED) eligibility;
- work with the CSE to help write new IEPs for scholars identified as eligible for SPED services;

- cooperate with the CSE to ensure that all services identified on the IEP are provided
- prefer using in-house staff to provide pull-out and push-in instruction, but may contract out other services (i.e. speech and language therapy, occupational therapy, physical therapy) to the local sending district or a qualified third party.

In support of scholars receiving Special Education services and to ensure that SBCCS V works closely with the CSE, the school ensures that:

- the school's Special Education Coordinator will attend all CSE meetings;
- relevant school staff attend CSE meetings to help develop and amend an IEP; and
- school staff responsible for educating scholars will receive copies of IEPs of scholars in their classrooms and will receive training and support on their responsibility regarding the successful implementation of all classroom accommodations. That training and support will include (a) the referral process and CSE; (b) development of the IEP; (c) review of academic progress towards stated IEP goals, and IEP revisions, when necessary; (d) all reporting requirements; and (e) disciplining of scholars with disabilities.

The CSE will evaluate and develop scholar IEPs, with the assistance of parents and the school. The scholar's teachers (special education and general education) will attend CSE meetings to help develop, review, or revise a scholar's IEP. We believe it is important for staff working with children having disabilities to be involved with the CSE. Accordingly, the school will provide substitute coverage to allow teachers, as necessary, to attend CSE meetings. All professionals that teach or counsel a scholar will be provided with his or her IEP and the necessary support and guidance to implement all required instruction and services.

As previously discussed, special student populations will be educated within the general education classrooms, using the general education curriculum, when appropriate. SBCCS V will be highly data-driven and will be responsive to the needs of special student populations as required performance data necessities SBCCS V will ensure that all instructional staff are working to achieve student IEP goals and are able to adjust curriculum and instruction appropriately and responsively, based on academic and behavioral data, to meet the needs of all learners.

Importantly, if not critically, SBCCS V will strive for frequent, honest, and transparent communication between specialists and teachers to create carryover of strategies from the classroom environment.

c. English Language Learners

Discuss the school's methods and strategies for identifying and serving ELLs in compliance with all federal laws and regulations including:

- The process for identifying students whose first language is not English consistent with New York State required procedures and the methods for determining the scope of assistance that these students may need including how the school will ensure that they are not inappropriately identified as students with special education needs;
- The approach, resources, and personnel (including qualifications and associated administrative responsibilities) the school will use to meet the needs of ELLs (both within general education classrooms and in other settings);
- The research and evidence that supports the appropriateness of this approach;
- The process for coordination between general education teachers and staff serving ELLs and professional development for general education teachers serving ELLs;
- The process that will be used to monitor the achievement and progress of ELLs including exit criteria;

- How the school will make all necessary materials available to parents of ELLs in a language that they can understand;
- How the school will make after-school and other extra-curricular programming accessible to ELLs; and,
- The process that will be used to evaluate the efficacy of the program and instructors and ensure that the needs of ELL students are being met.

We believe that developing a strong proficiency in English as soon as possible will enable all ELLs scholars to reach the academic goals established for all scholars. Therefore, we will provide structured immersion to improve a child's English proficiency. Structured immersion is a methodology for teaching ELL scholars the English language through in-classroom English-only immersion. The classroom teacher provides individualized structured and sequential lessons in English for the ELLs, who remain in the "general" education classroom, being instructed using the general education curriculum with differentiated support. Teachers in structured immersion settings are provided with specific professional development tools to aid in improving the scholars' comprehension and fluency in English, such as clarity of speech training, classroom noise control, use of native language when appropriate, maintaining positive outlook, setting academic goals, use of visual aids, remedial assistance, and planning toward total "mainstreaming" or declassification due to reaching English proficiency.
SBCCS V will comply with all applicable federal, state, and local law. In accordance with federal law, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974, CCS is committed to ensuring that all scholars are given the best opportunity to succeed. The SBCCS V language support program consists of five elements:

Identification: The identification process begins with the school's required use of the Home Language Identification Survey (HLIS) to identify all incoming scholars for potential limited English proficiency. If the scholar's home language is not English or the scholar's native language is not English, then staff will conduct an informal interview in the scholar's native language and in English. The HLIS serves to identify scholars in whose homes English is not the spoken language in a manner that is equitable, comprehensive, and not based on assumptions or stereotypes. This method also identifies exposure to other languages and use.

Assessment: If a scholar speaks a language other than English, or speaks little or no English, then the school will administer the New York State Identification Test for English language learners (NYSITELL).

Scholars will be assessed annually, by the ELL Coordinator, to determine and support the scholar's ELL classification. All scholars, regardless of language proficiency, will be provided the necessary curriculum and instruction to allow them to achieve the high standards set for all scholars. Scholar progress in the core academic subjects will be evaluated regularly to determine if any changes to the educational program are necessary.

Placement and Services: With the school's structured immersion approach, all ELLs will learn in the same classrooms as English-speaking children. All teachers will receive professional development in educating ELL scholars. In addition, teachers will be given specific and general training, by the ELL Coordinator, on identifying scholars who continue to experience difficulty in English-related issues. They will also receive a curriculum that will mesh with general education scholars' work and will serve as enrichment for the scholars. ELL scholars may receive "push-in" English training to facilitate improvement of English, and will be frequently paired with English-speaking scholars in the classroom and content-rich subject matter will be taught using Specially Designed Academic Instruction Delivered In English (SDAIE) whenever possible.

In the event that scholars are not improving at the rate anticipated through immersion, additional supports may be implemented. These supports include strategic classroom pairings with a scholar who is English proficient or a

scholar who speaks the same language, to aid in explaining ideas. Classroom teachers and support staff may assist in providing additional reading, vocabulary, and language instruction. At times the school will hire a tutor, as explained above, to provide further instruction.

In order to maximize our ELL program's effectiveness, parents will be consulted and empowered to guide their children's placement and service requirements. Each year, after ELLs have been identified as needing ELL services, by the ELL Coordinator, parents will be invited to meet with teachers, tutors, and administrators to collectively decide the best course of action to a common goal: all scholars will become proficient readers, writers, and speakers of English by the third grade.

Since the school will enroll scholars in primarily kindergarten and will replenish only those seats vacated through attrition after first grade, we believe we have the ability to immerse each child in English using appropriate supports, while still allowing them to remain in a general education setting. All other ELL educational programming will be parallel to that of non-ELL scholars. However, in the case of certain State tests, accommodations such as extended time, individual administration, translation of directions, and oral reading of directions in English may be used.

Scholars with limited proficiency in English will have the same access to all curricular and extra-curricular activities as all other scholars. ELLs requiring special education services will receive those services using Sheltered English and/or their home language. No scholar will be placed in Special Education settings solely as a result of their language proficiency.

Transition/Exiting: The school's exit criteria for scholars with limited English proficiency are based on scholar achievement or progress in the English language measured annually by the New York State English as a Second Language Achievement Test ("NYSESLAT") administered by the ELL Coordinator. Scores on the NYSESLAT indicate the proficiency level (Beginning, Intermediate, or Advanced) the scholar has achieved each year, and whether or not the scholar's level of English is high enough to exit the ELL program. Our goal is for all scholars to achieve English proficiency by the second grade, so they will be ready to excel on the State exams that begin in third grade. The scholars must be tested by CSE in both languages to determine primary language, with the goal of diagnosing impairment versus language challenges.

Monitoring: SBCCS V will assess ELL scholars through: The NYSITELL to measure English proficiency; the NYSESLAT (as required); teacher observations, and state tests. Most importantly, SBCCS V will assess, monitor, and evaluate ELLs individually by creating individual plans and goals to assure that scholars exited from the language support program are achieving academic excellence without encountering barriers due to limited English proficiency. Notices and messages going to our families will be translated into their native tongue. No barriers will exist between the opportunities of English speaking scholars and ELL scholars. Home visits to scholars' homes to discuss issues in their native tongue will also create a bond between the family and the school.

d. Gifted and Advanced Students

Discuss the school's methods and strategies for identifying and serving students who are academically advanced and/or gifted including:

- How the school will identify advanced and/or gifted and talented students; and,
- Strategies and programs the school will use within general education classrooms and in other settings to accelerate learning for advanced and gifted and/or talented students including how the school would implement these strategies in a remote setting.

What to Submit:

- Submit the response to Request 8(a-d) as a Word® file named: R-08ad- Specific Populations.

SBCCS V will not offer a gifted and talented program. However, our teachers will leverage data and very frequent analysis of scholar performance to ensure they keep a pulse on how all their scholars are performing across the year. If a scholar is performing particularly well and mastering all standards, our teachers will utilize differentiation strategies and provide extension opportunities on the work scholars are currently doing. This provides those above-average scholars more complex at-bats working with particular skills and content areas and challenges them to work toward goals that might be more aligned to what is expected at the next grade level up.

These differentiation methods are not formalized, and teachers are encouraged to collaborate with their team leaders and instructional coaches for best practices on how to differentiate for scholars performing above average.

R-09ad – Instructional Leadership

Proposals should include strategies to promote and prioritize diversity and equity within the operational, instructional, and administrative leadership and staff.

a. Instructional Leadership Roles

Describe instructional leadership (i.e. individuals supervising implementation of the academic program) in the school over the first five years of operation including:

- Specific roles and responsibilities of the personnel who would provide instructional leadership in the proposed school including a delineation of which instructional staff each instructional leader is responsible for supporting;
- The process and criteria for identifying and selecting instructional leaders including how such criteria align with the school's educational philosophy and mission; and,
- How instructional leaders will monitor the effectiveness of the academic program and at-risk students' academic performance.

Similar to the other CCS schools, the instructional leadership roles will include:

- Executive Director (ED): Manages and supports all Directors, Department Heads, and School Directors
- School Directors (SD): Manage the Grade Team Leaders, Deans of Students, Operations Managers, Instructional Coaches, Scholar Service Team Managers, Specials Managers, and At-Risk Learning Specialists, among other responsibilities.
- Director of Curriculum & Instruction (DCI): Supervises Curriculum Manager and oversees all Curricular and Instruction-based procedures for the network. Develops Instructional Coaches that work across the network.
- Instructional Coaches (IC): ICs do not manage personnel; their role is primarily to support and develop instructional staff by providing feedback on an at-least weekly basis. They support GTLs in overseeing and executing academic logistics across the school.
- Grade Team Leaders (GTL): Manage their respective grade teams, overseeing all logistics and academic priorities for their grade-band, and ensuring deadlines are met and responsibilities are upheld by their team members. GTLs also provide instructional feedback to their team members, sometimes with support from their Instructional Coach.
- Specials Managers (SM): Manage a site's Specials team, including Art, Music, and Fitness teachers, overseeing all logistics and academic priorities for their respective subjects and school initiatives.
- Scholar Services Team (SST) Manager: Manage a site's Scholar Services Team to ensure that high-quality mandated services are being provided to scholars, and that both scholars and teachers are adequately supported by the SST.

Instructional leaders at Classical are often developed and promoted from within. Often, strong teachers that demonstrate organizational excellence and leadership skills are promoted to Grade Team Leader or managerial positions. Many of our Instructional Coaches were once Grade Team Leaders at our schools or were recruited from similar leadership positions at other schools. Classical also offers a School Leadership Fellowship that supports and develops leaders interested in transitioning into a School Director position.

Instructional leaders across our network play a major role in monitoring the effectiveness of our academic program and at-risk scholar performance. Grade Team Leaders, Instructional Coaches, and SST Managers frequently collect and review scholar data to assess progress and areas for improvement. GTLs and ICs are frequently observing instruction and reflecting on not only teachers' practice but the network curriculum more broadly. Using our Curricular Audit process, GTLs and ICs identify areas for improvement within our curriculum and play a role in executing the changes needed. Additionally, instructional leaders support our teachers in refining tutoring and intervention groupings and differentiating instruction based on the trends in scholar performance on a weekly or daily basis.

b. Teacher Support and Supervision

Describe the school's approach to ongoing individual teacher supervision and support including (but not limited to) coaching and feedback systems and supports to ensure high quality instructional planning and implementation. The response should include a clear outline of how and when specific school leaders will conduct their support of individual teachers explaining the frequency of different forms of support teachers can expect on a regular basis (e.g. the frequency of classroom observations and feedback, length and substance of other development meetings such as one-on-ones). This response differs from 10c in that this response should focus on supports individual teachers receive to foster their instructional development, as opposed to 10c which focuses on supports that all teachers or particular groups of teachers will receive.

Teachers at CCS receive an enormous amount of support and training both in August and throughout the year to help ensure that execution, assessment of understanding and data analysis are strong. Each teacher, regardless of tenure, is assigned an Instructional Coach. Each teacher is observed at least weekly and spends time each week debriefing with their Instructional Coach about the lesson that was observed. Coaches also execute frequent artifact observations; they analyze scholar work to determine how the curriculum and the teacher's execution is meeting scholar needs. The Coach then provides detailed next steps and follows up with the teacher frequently regarding any proposed adjustments. In addition to support from an Instructional Coach, teachers receive constant support from their Grade Team Leader, a veteran teacher on the team. The Grade Team Leader helps to oversee the grade's curriculum, leads daily and weekly meetings, and ensures that lessons are being executed as envisioned through weekly observations and debriefs.

Each teacher focuses on approximately three instructional areas at any given point. At the start of each year, we focus heavily on behavior management to ensure that teachers across all classes are able to effectively manage in small group and whole class settings and then can begin to focus on instructional strategies. Typical teacher goals at the start of the year might be: 100%, Strong Voice, and Tight Transitions. After several weeks, the teacher would likely begin to focus on Engagement, followed by No Opt Out, Checking for Understanding, Ratio, and Differentiation. Teachers and Instructional Coaches work together to outline a map of instructional goals that are suited to the individual teacher. The goal is to move teachers systematically through increasingly complex instructional goals to ensure teachers regardless of tenure are consistently improving. Special service providers also receive this weekly goal-oriented support.

c. Professional Development

Describe how the schoolwide professional development program (i.e. all staff PD sessions, specific group PD sessions such as planning meetings, new teacher trainings, etc.) will assist teachers in meeting all students' academic needs and school goals including:

- An overview of the frequency and format of professional development;
- Who will be responsible for leading and providing professional development;
- How the school will identify professional development topics;
- How the school's professional development plans support the school's mission, key design elements, and the target and special populations' needs;
- How the professional development program will meet the needs of all teachers, including novice teachers, teachers new to the school, highly effective teachers, and teachers of all subjects, including teachers of students with disabilities and ELLs; and,
- The process for evaluating the efficacy of the professional development program.

In addition to individualized support, professional development ("PD") is a critical component of our instructional development system. New teachers receive professional development for ten days in August. Our returning staff attends seven days of professional development. In each subsequent month, teachers receive three hours of network-wide professional development. During these sessions, teachers learn instructional and curricular strategies that they can immediately implement in their classrooms. During August PD, teachers attend sessions ranging from strategies to increase math fact fluency, to motivating readers, to planning Close Reading effectively. Instructional leadership presented 85 sessions over August PD focusing on behavior management, curriculum, and instruction. Teachers pick, with support from their Grade Team Leader and Instructional Coach, sessions that will most immediately impact their growth and scholar achievement. In more recent years, we have developed an initiative for Grade Team Leaders and veteran teachers to opt into developing and facilitating their own Professional Development sessions to staff on a topic they are most experienced in and passionate about.

Assessment of Professional Development

SBCCS V will seek to continually improve the professional development of all its staff. To achieve this, we will distribute surveys after each session, seeking feedback and constructive criticism. Additionally, a school-wide survey is given to all staff twice-annually, which includes a section on professional development. This is similar to the process used to great effect by other CCS schools.

d. Teacher Evaluation and Accountability

Describe how the school will formally evaluate teachers and hold them accountable for student achievement. If established teacher evaluations systems (e.g., Danielson rubric) would be used, the response should explain how the particular system was chosen and how it aligns with the overall proposed mission and academic program. This response should also include:

- An explanation of how expectations for teacher performance and student achievement will be established, communicated to, and instilled in staff members; and,
- A description of the school's process and criteria for evaluating teacher performance and holding teachers and leaders accountable for student achievement.

What to Submit:

- Submit the response to Request 9(a-d) as a Word® file named: R-09ad- Instructional Leadership

Evaluating teachers is a complex process, involving many variables. While the Founding Team of SBCCS V prides itself on the sophistication of its data analytics, it does not believe any one universal formula will fully encapsulate

all the variables and factors that go into teacher evaluation. Instead, SBCCS V will evaluate teachers based on many of factors, including:

- Scholar achievement
    - Based on scholar growth in standardized test scores
        - Importantly, scholar growth is based on both average growth and proportion of scholars at or above grade level
        - Reading Levels and reading growth
- Teacher Rubric score (as described below)
- Special contributions
    - Curricular planning
    - Special expertise

The Teacher Rubric is a professional development tool to assess teacher performance across a range of specific required responsibilities and characteristics, using substantive feedback from Instructional Coaches and Grade Team Leaders or Managers. Rubrics are used to target specific growth areas, rather than a direct indicator of a teacher's professional abilities. Rubrics will be utilized twice a year, in early December (roughly day 65) and late April (roughly day 140). To ensure statistical validity, the Teacher Rubric requires a minimum of five (5) written forms of teacher feedback.

Score and Rubric Score Descriptors	
4	Mastery; fully internalizes the skill. Can provide high-quality professional development
3	Proficient; if all teachers exhibited that level of ability, the school would just achieve its mission
2	Needs Improvement; the characteristic should be addressed
1	Urgent Need of Immediate Improvement Required

Rubric Categories

Modeled heavily after Kim Marshall's rubric, our Teacher Rubric has five (5) categories with between 3 and 11 sub-categories each. Please note, however, that the rubric continues to evolve as we connect results from such rubrics to actual scholar achievement.

Grade Team Leaders	Professional Responsibilities	Classroom Management	Execution	Culture of Analysis
• Vision • Logistical Management • Process Automation • Outcome Management • Change Management • Team Culture • School Culture • Interdepartmental Collaboration • Team Development • Resiliency and Future Planning	• Language • Reliability • Dress • Professionalism • Collaborative Leadership • Growth • Urgency • Mission Fit	• Culture • Effiency • Environment • Expectations • Incentives • Prevention • Routines • Parental Outreach	• Application • Checking for Understanding • Clarity • Connections • Differentiation • Engagement • Expectations • Preparation (Scripted) • Preparation (Unscripted)	• Accountability • Curricular Reflection • Data Analysis • Scholar Feedback • Data Entry

III. Individual Professional Improvement Plans (IPIP)

Regardless of their score on the Teacher Rubric, all teachers will produce mission-aligned and historically consistent IPIPs with SMART goals as the key component, which are developed after a meeting with their Instructional Coach and Grade Team Leader, or Manager, regarding the Teacher Rubric. Constant improvement requires meticulous data-driven analysis, laser focus on our mission, brutal hard work, and a deep internal reflection on one's performance.

Rubric and IPIP Timeline

Teachers receive their Rubric in December and in April. By the end of March, the Instructional Coaches and Grade Team Leader, or Manager, will collaborate to complete all Rubrics. Components of the Rubrics for Grade Team Leaders and Team Managers are completed by School Directors as well as Instructional Coaches. Shortly thereafter, Rubric meetings are scheduled to discuss each employee's progress.

Strengths Assessments

School Directors are responsible, in collaboration with others (for certain employees), for completing Strength Assessments for specific managers and leaders within the school. While the Rubric is a tool that allows us to reflect on performance on the technical skills of an employee's job, the Strengths Assessment allows us to reflect on core competencies in management and leadership.

There is a self-assessment component to the Strengths Assessment tool, which allows the employee to self-reflect on his/her competencies and areas in need of growth. As such, the Strengths Assessments are scored by both the manager and/or coach and the person receiving the assessment. GTLs, ICs, Deans, and all other managers in their 2nd year or beyond receive a Strength Assessment.

Strengths Assessments are completed alongside Rubrics, once in the Fall and once in the Spring. Any core values scored as "Limited" or "Developing" by either a manager or coach will be re-scored in the Spring.

R-10a – Culture and Discipline

a. School Culture

Explain how the school will establish and maintain a culture that supports learning and achievement including:

- The school's general approach to school culture and rationale for this approach;
- Any specific programs and methods the school intends to implement to support the social and emotional development in students and rationale for their selection;
- Any specific programs and methods the school intends to implement to support teachers and other staff in creating and sustaining an equitab+le school culture and the rationale for their selection
- How the school will maintain a safe and orderly environment; and,
- How the school will instill the culture and expectations with board members, staff, students, and families.

SBCCS V must provide a safe and secure environment where all scholars can focus on their schoolwork and character development. Perhaps more than anything else, we must promise parents that their children are in safe and capable hands throughout the extended day and year that children attend our schools. Safety is of such great concern that our Accountability Plan holds us fully accountable for parents' assessment of the school's safety level. Critically, we define safety to include not just physical safety but also emotional and mental safety as well.

To this end, SBCCS V has set forth policies that support our mission, ensure a culture of safety and achievement, and are consistent with the spirit and requirements of due process and federal laws and regulations.

Our Code of Conduct was created to

- ensure that our school is a respectful learning space where all stakeholders feel safe;
- allow all teachers and scholars to focus on learning; and
- build "liberated scholars and citizens of impeccable character," per our mission.

All parents will receive the Code of Conduct after they enroll their children into SBCCS V, but before the first day of school. Parents sign off that they received the Code of Conduct and are also notified that it exists on our website. The Code of Conduct describes behaviors that SBCCS V considers behavioral infractions and the consequences of those behaviors. We believe an effective behavior management system includes the following elements:

- A total staff commitment to deploying and using a system to manage behavior
- Well-defined and articulated rules, expectations, procedures, and consequences
- Student instructional content to teach self-control and social skills (Character Education)
- Support resources for students with chronic and challenging behaviors (SST, Deans)
- Support resources for teachers in navigating scholar behavior and emotions (ICs, Deans)
- A schoolwide commitment to academic achievement and social competence

Designing specialized systems for both elementary- and middle school-aged scholars helps optimize the results and strengthen a healthy school culture. Additionally, Classical has prioritized positive incentives across our school buildings to ensure our management system is motivating and awards desired behavior and efforts from scholars.

Scholars who do not meet the school community's clearly defined standards for reasonable and acceptable behavior will not be permitted to disrupt the education of others. Without a firm and consistent discipline policy, none of what we envision for our schools can happen. This is the basis of our Code of Conduct. It is important to note that since SBCCS V will provide a "highly structured setting" (again, stated in our mission), in which expectations are clearly explained and consistently modeled, such infractions as are described below will be rare. As stated in our Discipline policies included in Attachment 4, SBCCS V will comply with all Federal and state laws (including the Dignity for All Students Act) regarding the long-term suspension and expulsion of Students with Disabilities.

The school's discipline policy will be implemented through our Deans of Students. Teachers will refer scholars to the Dean upon infractions noted in the Code of Conduct, and in turn the Deans will work with scholars to understand the infraction and, more importantly, the reasoning behind it. This process could result in a range of consequences from reflecting on behavior with a Dean to out-of-school suspension, and perhaps to expulsion. (In its 19-year history, no child has been expelled, or has even had the process initiated, at CCS.)

To encourage family involvement and collaboration around common messaging about learning and character, the school will feature the following:

- Parent Academy provides mission-driven educational opportunities in English and Spanish for families of SBCCS V scholars. Managed by the Family Advisory Council, Parent Academy will be held monthly and will provide seminars by guest speakers.
- Open House and Report Card Night are opportunities for parents and guardians to visit the school, meet with teachers, learn the expectations in each classroom and school-wide, and discuss their child's academic and behavioral progress.
- Community Gatherings are public celebrations which showcase the achievement of SBCCS V scholars. During community gatherings, our school, families, and community come together to celebrate our mission.

To assess whether the school is safe, that communication is strong, and that parents are involved with the process of building a fair discipline policy, school leaders will closely review results from the Learning Environment Survey; in this context, especially questions about safety and communication. In addition, family concerns and questions are actively sought by our Deans and School Directors. Lastly, instructional leaders from all CCS schools visit each other frequently to ensure a strong network-wide collaboration and assessment.

Additionally, we have implemented programs to create space for scholar discourse and socioemotional development, including morning meetings, recess, and Classical Conversation blocks, in which scholars discuss current or social events relevant to their lives. Implementation of morning meetings and recess has greatly benefited our scholars by giving them space to interact with their peers in a more informal setting.

In addition to our Dean team, our Operations team members will help to maintain a safe and orderly environment in our building by setting and reinforcing clear expectations for internal procedures. For example, arrival and dismissal procedures will be clearly choreographed so that staff and scholars know exactly what to do, and procedures will be reviewed to improve efficiency across the year, as needed. Operations, Deans and School Leadership will oversee all school policies and procedures to ensure the safety of our scholars and staff, and to create a calm, productive learning environment for our scholars.

The school will instill its culture of warmth and high expectations with its board members, staff, students, and families by making the culture visible at every visit in the way in which our staff interact with children and their families, the way our scholars are immersed in their learning, as well as in our communication with the board and families.

R-10b – Discipline Policy

b. Discipline Policy

Provide the school's discipline policy for general education students. The policy must:

- Clearly specify (i) the substantive acts for which a child may be disciplined; (ii) the consequences resulting from committing each such act; (iii) the due process procedures the school will follow in applying its disciplinary policy (in accordance with federal law); and, (iv) the individuals responsible for carrying out the discipline policy and any appeals;
- Explain the procedures for providing alternative instruction to students who are suspended or expelled (whether in-school or out-of-school) in full compliance with state requirements;

- Include specific methods that comply with the federal Gun Free Schools Act, including reference to mandatory penalties required by the law; and,
- Set forth the 14th Amendment due process protections for both short-term suspension of 10 or fewer days and longer term suspensions of greater than 10 days based on U.S. Supreme Court case law (Goss v. Lopez, 419 U.S. 565 (1975)).

RESPECTFUL ENVIRONMENT

Respect is a core value at SBCCS V, and scholars are expected to demonstrate the following elements of respect each day:

Respect for self
- Carrying themselves with a sense of dignity every day – in their behavior, language, and their school uniform dress

Respect for fellow scholars
- Showing support, encouragement, and kindness to all scholars and refraining from insulting, teasing, bullying, or physically harming others

Respect for faculty, staff, and all adults
- Listening and following instructions and using appropriate language, gestures, and tone of voice in all interactions with adults

Respect for the classroom
- Following the rules of the classroom; working hard and dedicating themselves to excellence; participating in class activities and completing all homework; and attending class each day, arriving on time, with all materials necessary for school

Respect for property
- Respecting their personal property and the property of other scholars; maintaining their textbooks and other materials; and caring for school grounds/property and pitching in to keep them clean and neat

SBCCS V will comply with all aspects of the Dignity for All Students Act.

Our Dean of Students is responsible for disciplinary concerns. The Dean collaborates with teachers, families and scholars to help create a safe and orderly learning environment. The Dean is given the authority to decide on the appropriate consequences for inappropriate scholar behavior.

SBCCS V must provide a safe and secure environment, from the moment the scholars leave their homes to the moment they return, where they can focus solely on mastering their skills in reading, writing, math, science and social studies. South Bronx Classical must promise parents that their children are in safe and capable hands throughout the extended day and year that scholars attend the school .To this end, SBCCS V has set forth policies that support our mission, ensure a culture of achievement, and are consistent with the requirements of due process and with federal laws and regulations governing the placement and disciplining of Students With Disabilities.

We have created a Code of Conduct in order to ensure that our school is a respectful space for learning where all feel comfortable, allow scholars to focus on their learning, and prepare scholars to become engaged citizens who follow rules set by our communities.

The Code of Conduct describes behaviors that the school considers inappropriate or unacceptable (“behavioral infractions”) and the consequences of those behaviors. Scholars who do not to meet the school community’s clearly defined standards for reasonable and acceptable behavior are not permitted to disrupt the education of

others. Without a firm and consistent discipline policy, none of what we envision for the school can happen. This is the basis of our student Code of Conduct. It is important to note that since SBCCS V will provide a highly structured setting, in which expectations are clearly explained and consistently modeled, we anticipate that such infractions as are described below will be minimal. We believe that scholars rise to the level of behavioral expectations we set for them, and that within a disciplined environment, along with positive and consistent modeling, scholars will behave very well.

BEHAVIORAL INFRACTIONS

The following list of behavioral infractions is not comprehensive; it offers examples of inappropriate or unacceptable behaviors. While we have stated possible consequences for certain behavioral infractions, South Bronx Classical staff has sole discretion to determine the consequence of each behavioral infraction.

A school-related behavioral infraction refers to the violation of this code occurring while the scholar is on school grounds or school-related transportation, during school-sponsored activities and trips, and during all other school-related events.

RESPECTFUL BEHAVIOR

At SBCCS V we help our scholars grow into mature young people. To that end, while we will not tolerate disrespect, we do allow for scholars to disagree respectfully with each other and with adults. We have developed routines and procedures that enable scholars to do so.

TRAFFIC LIGHT AND PAYCHECK BEHAVIORAL SYSTEMS

If a scholar disrupts learning for himself or others, there is a consequence to that behavior. In K-4, our teachers use a Traffic Light system to aid with classroom management. All scholars start their day on 'Green'. If a scholar commits any of the following minor infractions, the scholar will move down levels on our traffic light behavior system. After three warnings, a scholar moves to 'Yellow'. If the scholar receives three more warnings within a specific time frame, they will move to a Cool Down desk to refocus. If the behaviors persist and three more warnings are delivered, the next consequence would be a Reflection which requires a written form reflecting on their behavior. Scholars reset back to 'Green' at different points in the day and ultimately their goal, and the teacher's goal, is for scholars to remain on 'Green'.

In grades 5+, teachers implement a 'Paycheck' system that involves both checks for infractions and points for positive behaviors demonstrated (which are also a large part of K-4 behavior management). Similar to K-4, after a certain number of checks, scholars move to a Cool Down and then to a Reflection thereafter if they are unable to improve their behavior.

Behavioral infractions include, but are not limited to making inappropriate noises or speaking out of turn during class; not paying attention or following directions or procedures of the class or school; chewing gum; and other behaviors deemed inappropriate by school staff.

DETENTION

If a scholar endangers himself or others physically or verbally, and thus commits any of the following major infractions, the scholar may receive a detention. Behavioral infractions which warrant a detention include, but are not limited to:

- Moving down from green to yellow to red on the traffic light; disrespecting a fellow scholar; disrespecting faculty, staff, or other member of the school community; disrespecting school property; deliberately disrupting class; engaging in disruptive conduct or making scholars feel uncomfortable/excluded; failing to return a signed progress report or report card the day after distribution; and chronic tardiness.

PROCEDURES FOR TRAFFIC LIGHT MOVEMENTS AND DETENTIONS

If a scholar commits an infraction and the consequence called for is any other than suspension or expulsion, staff members are authorized to address the infraction and invoke the consequence according to their professional judgment. The School Director and Dean of Students will be responsible for ensuring through professional development that teachers are modeling positive and appropriate behaviors consistently and applying the Code of Conduct in a uniform and equitable way.

Teachers will notify school leaders of any significant or repeated discipline concerns and seek support from school leaders in finding ways to modify scholar behavior where needed. The school will reserve the right to insist upon parent involvement in resolving the disruptions before the student will be allowed to return to class.

Detention may be served during lunch, Enrichment, choice time, or with a buddy teacher on day the detention is earned. Such decisions are at the discretion of the teacher and/or Dean of Students. There may be some days when a scholar is required to stay in another classroom for detention.

IN-SCHOOL AND OUT-OF-SCHOOL SUSPENSION

If a scholar endangers the school community and commits any of the following gross infractions, the scholar may receive an in-school or out-of-school suspension, as determined by the Dean of Students and School Director. Behavioral infractions which warrant a suspension include, but are not limited to:

- Gross disrespect of a fellow student, faculty member, or school transportation provider; damaging, destroying, or stealing property or attempting to do so (including graffiti); using or possessing tobacco products; inappropriate sexually or racially motivated conduct; using abusive, vulgar or profane language; fighting, or any form of harassment or intimidation; making verbal or physical threats, empty or otherwise; setting off false alarms; gambling, forging, plagiarizing, or cheating; and being charged with a felony.

PROCEDURES FOR IN-SCHOOL AND OUT-OF-SCHOOL SUSPENSION

If a scholar commits an infraction that calls for a consequence of short-term suspension (ten days or fewer), such action will be recommended by the Dean and possibly approved by the School Director. In such cases, the school will adhere to the following procedure, consistent with applicable law:

- The scholar shall be informed of the charges against them as well as the evidence of those charges; the scholar will have the opportunity to explain their side of the events; the school will immediately and personally notify the parent and will call or send written confirmation by personal delivery or mail within 24 hours of the decision to suspend a scholar; the parent will have the opportunity to discuss the suspension with the Principal; the school may require a meeting with the parents before the scholar may return to classes; if the scholar is out-of-school suspended, alternative education will be an option. If the scholar does not attend alternative education, the scholar's suspension will be an unexcused absence.

ALTERNATIVE EDUCATION

Alternative Educational Services are in-school instructional services provided to all scholars who have received an out-of-school suspension for 1-5 consecutive school days. Parents/Guardians must check the appropriate box, located at the bottom of the suspension letter or contact the school's Dean of Students.

EXPULSION

Expulsion is defined as the exclusion from the school on either a long-term or permanent basis at the discretion of the Executive Director or his/her designee. Behavioral infractions that can lead to expulsion include:

- Possessing a dangerous or illegal weapon or anything intended to be used as a weapon including, but not limited to, a knife or a gun; possessing a controlled substance including, but not limited to, illegal drugs or alcohol; repeated suspensions; assault (i.e. threatening assault, hitting, kicking, punching, slapping, pushing) against fellow students or other members of the school community; theft or destruction (attempted or actual) of personal or school property, including arson; and consistent and continuous behavioral infractions as noted above.

PROCEDURES FOR LONG-TERM SUSPENSION OR EXPULSION

Long-term suspension indicates the removal of a scholar from the school building for disciplinary reasons for more than ten days. Expulsion refers to the permanent removal of a student for disciplinary reasons. The following procedures which comply with applicable law are followed:

- The scholar is immediately removed from class/school as needed; and the scholar is informed of the charges against him/her as well as the evidence of those charges; the scholar has the opportunity to explain his/her side of the relevant events.

The Dean of Students immediately notifies a guardian of the child in person or on the phone and sends written confirmation by personal delivery or express mail within 24 hours of the decision to suspend or expel, and sets a date for a formal hearing and notifies guardians in writing of the date, time, and place of the hearing, as well as:

- The charges against the scholar; a summary of the supporting evidence; and their right to be represented (at their own expense) by an attorney at the hearing, present evidence, and question witnesses.

The School Director or Executive Director will preside at the hearing and makes a decision as to the scholar's status and issues a written decision which is sent to the scholar's guardians, the Board of Trustees, and put in the scholar's permanent file. If the School Director or Executive Director finds that long-term suspension or expulsion is indicated, the guardians of the scholar may appeal this decision to the Board of Trustees within ten days of the decision to suspend or expel.

If there is an appeal, the guardians are once again notified in writing of the date, time, and place of the hearing, as well as the record and evidence presented at the original hearing. There is an additional chance for each party to make an argument to the appellate panel.

Upon receipt of a request for an appeal, a panel comprised of no less than three trustees who were not involved in the initial hearing will promptly hear the appeal. Each party will have twenty minutes in which to make a statement. The scope of the appeal will be limited to positions and the record established during the original disciplinary hearing. In rendering its decision, the panel may consult the transcript of the disciplinary hearing and any evidence submitted in connection with it. The panel will provide a written ruling within five school days. In situations where the student/family believes there has been a violation of the school's charter or applicable law, they may further appeal to the school's authorizer, the State University of New York (SUNY). If not satisfied by SUNY's ruling, they can appeal to the State Board of Regents.

PROVISION OF INSTRUCTION DURING REMOVAL

In order to ensure academic progress, alternative instruction is provided to scholars who have been suspended or removed. The method and form of this alternative instruction is determined on a case-by-case basis. In all situations, the method and form is selected with the goal of maximizing the scholar's academic progress. It enables the scholar to master material, complete assignments, and participate in assessments. Instruction commences within two days of a scholar being removed or suspended. In such cases, instruction occurs either: within the school facility, at the scholar's home, or at a contracted facility which is reasonably accessible to the scholar. It occurs either during the school day, before school hours, or after school hours.

POLICY FOR INFRACTIONS WHICH CONSTITUTE A VIOLATION OF THE LAW

Infractions which are violations of municipal, state, and federal law (such as weapons possessions, assaults, thefts, and possession of controlled substances) are reported to the appropriate law enforcement authorities (e.g., the New York City Police Department).

STUDENT SEARCHES

In order to maintain the security of all its scholars, we reserve the right to conduct searches of its scholars and their property. If searches are conducted, the school ensures that the privacy of the scholars is respected to the extent possible, and that scholars and their families are informed of the circumstances surrounding and results of the search.

SCHOLAR RESTRAINTS

SBCCS V maintains a strict Code of Conduct and clear disciplinary procedures. These procedures do not allow for corporal punishment but rather include a clear set of consequences including the traffic light movements, detentions, loss of privileges, suspensions, and expulsions. Corporal punishment of pupils is prohibited. School personnel can use reasonable force as is necessary to protect pupils, other persons, and themselves from an assault by a pupil. When such an assault has occurred, the Executive Director will file a detailed report of such with the board.

R-10c – Special Education Policy

c. Discipline Policy – Students with Disabilities

Provide the school's discipline policy for students with disabilities with assurances that it is in conformity with the federal Individuals with Disabilities Education Act ("IDEA") and regulations. The policy should address topics such as the discipline of students who have a behavioral intervention plan ("BIP") in their IEP and detail how classroom teachers would be knowledgeable about such plans.

All SBCCS V scholars will follow our schoolwide behavior system including students with disabilities. We will hold all scholars to high behavioral standards; however, we will add supports as needed. Scholars with Functional Behavior Assessments (FBA)/ Behavior Intervention Plans (BIPs) may have modified standards if deemed necessary by school-based counseling teams.

Students with disabilities that are struggling to meet schoolwide behavioral standards will follow the below supports:

1. If a scholar receives 3 Out of School Suspensions (OSS) they will receive a counseling analysis if they do not already receive counseling support. For scholars that are receiving counseling supports scholars will be added to a behavior plan or their current behavior plan will be modified
2. If a scholar receives 5 OSS, they will receive a counseling analysis if they do not already receive counseling support. For scholars that are receiving counseling supports scholars will be added to a behavior plan or their current behavior plan will be modified
3. If a scholar receives 8 or more OSS, they will receive a counseling analysis if they do not already receive counseling support. If the scholar already receives counseling the scholar will receive an FBA/ BIP.

If a scholar receives more than 10 OSS, the DSS will notify the Committee of Special Education to hold a Manifestation Determination Review (MDR). An MDR meeting will be held for each OSS once the scholar has reached 11 OSS.

Prior to MDR

The DSS will work with the CSE, school, and family to arrange a date and time for the meeting. The school counselor is responsible for updating the data from the FBA/ BIP or behavior plan to present at the meeting.

At the meeting

All school personnel that were in attendance prior, during, and after the incident that deemed an OSS. The school counselor is always required even if not involved in incident to go over counseling progress and Behavior plan/ FBA/ BIP progress. During the meeting the team will determine if the behavior that warranted the OSS was due to the scholar's disability. If the behavior was due to the scholar's disability, we will not have the scholar serve the OSS. If the behavior is not due to the scholar's disability, then the scholar will serve the OSS. At the end of the meeting the team will determine if the behavior is due to the scholar's disability.

After the meeting

If the behavior is not due to the scholar's disability, then the scholar will serve the OSS. If the behavior was due to the scholar's disability, we will not have the scholar serve the OSS. If the behavior is not due to the scholar's disability, then the scholar will serve the OSS.

R-10d – Dress Code Policy

d. Dress Code Policy

If the school would implement a dress code policy, describe the policy and the rationale for its selection. Include a description of how the school would subsidize the cost of uniforms for parents unable to afford them.

SBCCS V will be a uniform-required school. If a scholar is not wearing a complete uniform, it will be marked as an infraction. If uniform compliance is inconsistent, families may be required to attend a meeting with the Dean. Classical will support families in acquiring required uniforms and will provide them if necessary.

The uniform is a white button-down shirt (long sleeve or short sleeve), a navy-blue tie, navy blue dress pants, navy blue sweater, and black shoes (sneakers must be all black, no logos or color). Girls may wear a white shirt, navy blue jumper, skirt, or long pants, navy blue sweater, navy blue or white tights and black shoes (sneakers must be all black, no logos or color). Black shoes are mandatory and do not consist of boots of any kind. Polo shirts are not allowed. Grades 3-8 must wear a black belt with their pants. Parents should buy at least three (3) full uniforms.

We share store locations at which families can purchase uniforms within our Family Handbook and our Deans of Students are always available to work with families who need support providing uniforms.

What to Submit:

- **Submit the response to Request 10(a) as Microsoft Word® file named: R-10a- Culture and Discipline.**
- **Attach the school's Discipline Policies for general education students as a Microsoft Word® file named: R-10b- Discipline Policy.**

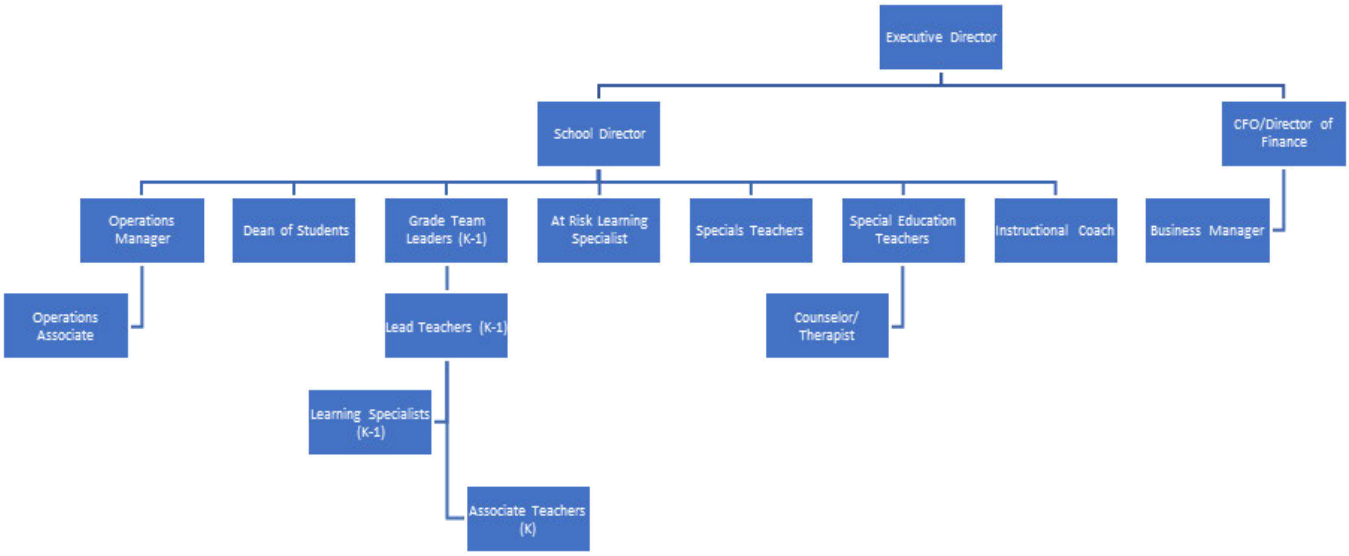
- Attach the school's Discipline Policies for special education students as a Microsoft Word® file named: R-10c- Special Education Policy.
- Attach the school's Dress Code as a Microsoft Word® file named: R-10d- Dress Code Policy.

R-11ab – School Management and Leadership

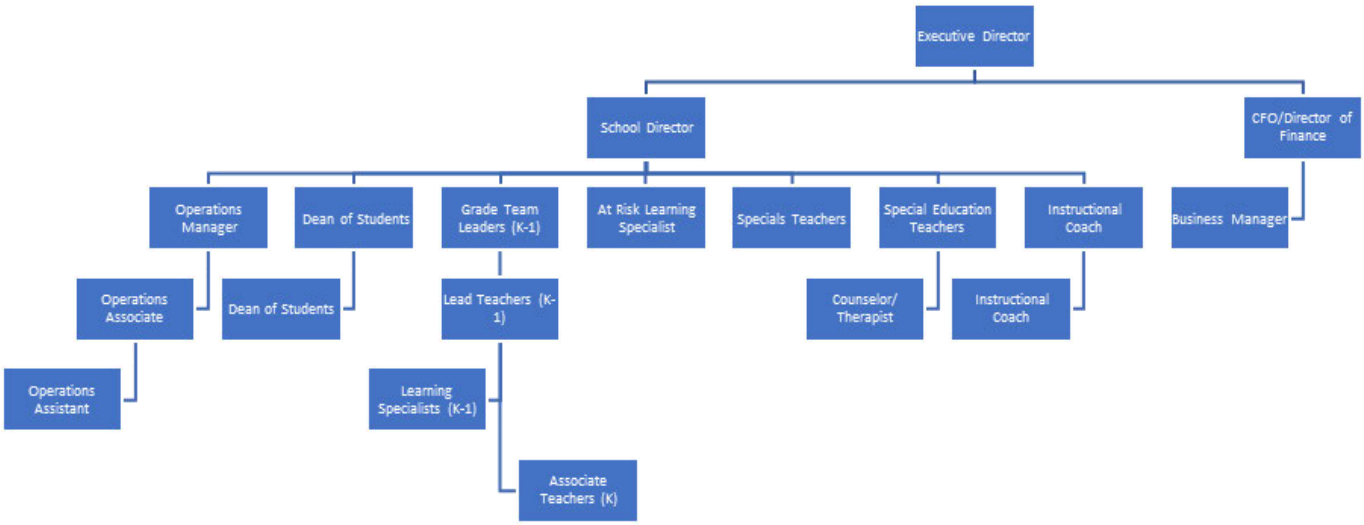
a. Organizational Chart

Provide organizational charts for both the first and fifth years of operation clearly showing reporting structures between the school leader(s), the board of trustees, and staff. If the school intends to contract or partner with an entity for management or educational services, the organizational charts should also reflect that relationship.

South Bronx Classical Charter School V, Year 1



South Bronx Classical Charter School V, Year 5



b. School Leadership and Management Structure

Include a narrative explaining the lines of reporting and accountability, the rationale for choosing this structure, and the roles of any management or partner organizations. The narrative should:

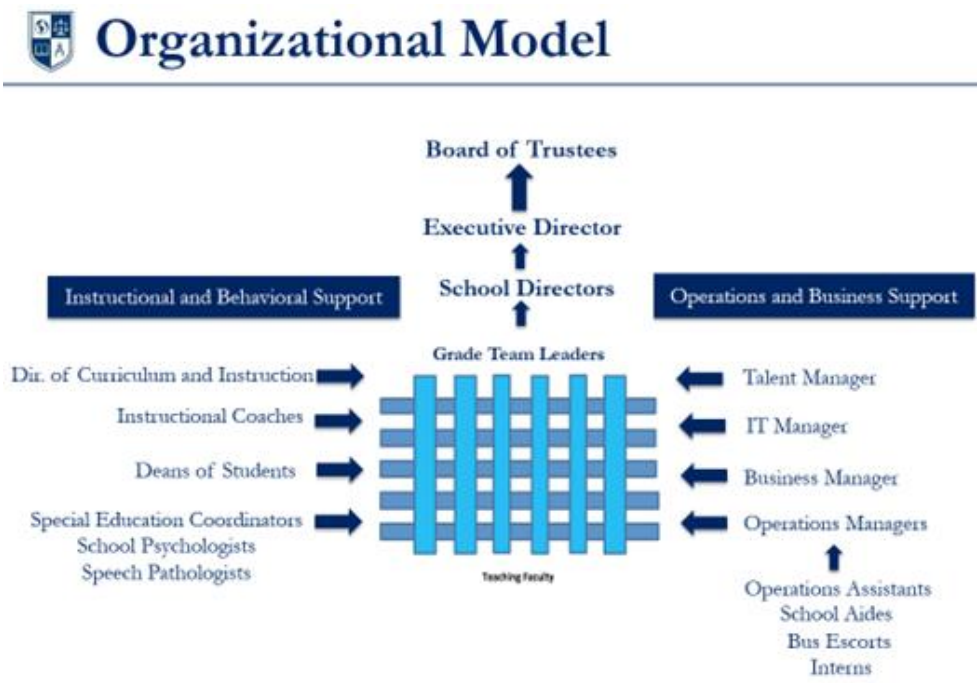
- Describe the management practices and procedures (e.g., how the school will set priorities and make key organizational decisions);
- Outline the evaluation procedures for staff in management positions; and,
- Describe recruitment plans for the school leader including:
    - The process and criteria the school will use to select the school leader;
    - Who has been or will be involved in the selection process; and,
    - The role of any CMO or partner organization (if any) in the selection process.

SBCCS V is led by the CCS Board of Trustees, comprised of 8-13 members, which governs the school and is responsible for ensuring that the school fulfills its mission, is faithful to its charter, and remains financially viable. The Executive Director (ED), supervised and supported by the Board of Trustees, will be responsible for implementing the school's mission. The ED will report at least monthly to the Board of Trustees on the state of the school, progress toward each element of the mission statement, and progress toward each goal in the Accountability Plan. The Board will evaluate the ED annually, provide detailed and critical feedback regarding his/her performance, and set his/her compensation.

The School Director will begin hiring staff for SBCCS V in January of 2025. Staff will be hired through a mix of teachers and leadership transferred from other CCS locations and from outside hiring, which will commence in March 2025 and is expected to be finalized in May 2025.

Organizationally, Grade Team Leaders, Deans, and Instructional Coaches will report to the School Director. Teachers report to their Grade Team Leader. This "matrix structure" is well-developed in other industries.

The Grade Team Leadership program's goal is to provide the school with a more disbursed, collaborative, and effective means of improving scholar achievement. By providing a select cadre of experienced, mission-aligned teachers with additional leadership opportunities, SBCCS V will develop its faculty and eventually create a "hire from within" culture that reduces the risk associated with administrative turnover. Grade Team Leaders take responsibility for team management and culture-setting; teacher observations; curriculum developing and vetting; meetings with the School Director; and implementation of special school-wide projects. This model is often called the Matrix Organizational Model (see sample from CCS below). It is used in many organizations that execute multiple projects, such as architectural or engineering firms. More relevant is their use in firms where management expertise requirements differ greatly from technical (in our case, pedagogical) expertise, such as hospitals, investment banks, etc.



The managerial organizational structure of SBCCS V is like most schools and organizations. Teachers report to their Grade Team Leaders who report to the School Leader. This structure optimizes coordination of tasks and operational efficiencies and is how most businesses and schools are run.

The technical organizational structure of SBCCS V provides experts in several areas of education (Director of Curriculum and Instruction, Instructional Coaches, Mentors, Grade Team Leaders, Special Education Coordinators, Speech Pathologists, etc.) to assist teachers in ways that a typical principal is rarely able to navigate.

The overall organizational structure allows managers to develop their team and pedagogical experts to focus on delivering the highest level of specific feedback to teachers and staff.

What to Submit:

- Submit the response to Request 11 as a Microsoft Word® or Adobe Acrobat® file named: R-11ab- School Management and Leadership.

R-12ac – Personnel

a. Staffing Chart and Rationale

Complete the table provided in the budget template to list every position (both instructional and non-instructional and including part-time positions) during the first five years of operation and include a copy of the table in this response. Provide a narrative that explains the rationale for the staffing structure and numbers and identifies a specific comparative source for staff salaries (e.g., a document with teacher salaries from the school district of location). Please note all positions outlined within the application should be reflected in the staffing chart.

The staffing chart developed in the budget template is included below.

ADMINISTRATIVE PERSONNEL FTE	FTE				
Executive Management	1.0	1.0	1.0	1.0	1.0
Instructional Management	1.0	1.0	1.0	2.0	2.0
Deans, Directors & Coordinators	1.0	1.0	1.0	1.0	2.0
CFO / Director of Finance	1.0	1.0	1.0	1.0	1.0
Operation / Business Manager	1.0	1.0	1.0	1.0	1.0
Administrative Staff	1.0	1.0	2.0	2.0	2.0
TOTAL ADMINISTRATIVE STAFF	6.0	6.0	7.0	8.0	9.0

INSTRUCTIONAL PERSONNEL FTE					
Teachers - Regular	11.0	14.0	17.0	21.0	25.0
Teachers - SPED	3.0	3.0	4.0	5.0	6.0
Substitute Teachers	0.0	0.0	0.0	0.0	0.0
Teaching Assistants	3.0	3.0	3.0	3.0	3.0
Specialty Teachers	3.0	3.0	3.0	3.0	3.0
Aides	0.0	0.0	0.0	0.0	0.0
Therapists & Counselors	1.0	1.0	1.0	1.0	1.0
Other	0.0	0.0	0.0	0.0	0.0
TOTAL INSTRUCTIONAL	21.0	24.0	28.0	33.0	38.0

NON-INSTRUCTIONAL PERSONNEL FTE					
Nurse	0.0	0.0	0.0	0.0	0.0
Librarian	0.0	0.0	0.0	0.0	0.0
Custodian	0.0	0.0	0.0	0.0	0.0
Security	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0
TOTAL NON-INSTRUCTIONAL	0.0	0.0	0.0	0.0	0.0

TOTAL PERSONNEL SERVICE FTE	27.0	30.0	35.0	41.0	47.0

This staffing structure ensures instructional staff will receive sufficient support from school leadership, including a Dean and Instructional Coach, and operations. As the school grows and grades are added, there will be a need to increase the number of Deans and Instructional Coaches to support scholars and staff, and a need to increase Special Education providers as well. In reference to our organizational chart, the teaching position includes lead teachers, grade-specific and at-risk learning specialists who prioritize small group, targeted instruction.

Salary and general compensation levels must remain competitive with those of peer institutions of comparable standards. Because the school is in a non-union organization in an industry that is heavily unionized, we will

endeavor to pay staff, particularly teachers, significantly more than they would be paid if they were employed in a traditional public school and were party to a Collective Bargaining Agreement.

b. Qualifications and Responsibilities

Provide a list of qualifications and responsibilities for each position including all instructional, non-instructional, and administrative positions as well as any part-time positions.

Elementary teachers are expected to teach a range of subjects across the grade(s) for which they are hired, prepare instruction thoughtfully to help close academic gaps and ensure scholars meet standards mastery. Elementary teachers should have their teaching certification or at least one year of teaching experience, working toward certification.

Middle School teachers are expected to have an undergraduate or graduate degree in the subject or a related discipline, a degree in education (specific to that subject), or at least three years of teaching experience within that subject or a related discipline.

Grade Team Leaders are more experienced educators who have demonstrated strong leadership skills to manage a team and oversee gradewide logistics. Grade team leaders must have two years of teaching experience, preferably at a rigorous school setting.

Instructional Coaches (IC) coach and develop 10-15 teachers per school year. This involves lesson observations, debriefs, work and assessment analyses, as well as the development and facilitation of whole school professional development sessions. As per qualifications, ICs should have some experience previously coaching or developing others, and at least four years of teaching experience in a rigorous school environment with evidence of strong performance.

The School Director will report to the Executive Director and will be the highest level full-time administrator at the school. The Dean of Students, Operations Manager, and Grade Team Leaders report to the School Director. The School Director's responsibilities involve the general oversight and operations of the individual school site. School Directors should have at least five years experience in the role of a Grade Team Leader, Instructional Coach, or Dean of Students.

The Director of Curriculum and Instruction is charged with curricular development and implementation and professional developing all teaching staff. This includes curricular management, teacher observations, and professional development of teaching staff.

The Dean of Students focuses on four core aspects of the school: enforcing our Code of Conduct, meeting with and supporting the Family Advisory Council, teaching Character Education and managing Community Gatherings. Deans must have at least three years of teaching experience to qualify for the role.

The CFO/Director of Finance manages all non-pedagogical aspects of SBCCS V. This includes financial management, human resources, and legal compliance.

The Operations Manager manages all day-to-day operations of the school and leads a team of Operations Associates/Assistants.

c. Staff Recruitment and Retention

Describe plans to recruit and retain staff members, particularly high-quality teachers including:

- The processes and policies to recruit and hire qualified teachers and other staff members that consider the specific quality and availability of talent in the proposed geographic area; and,
- The strategies for retaining high-quality teachers.

The core guiding principle guiding compensation at SBCCS V shall be *meritorious performance of duties*. Merit shall be defined as the collective professional judgments of administration based on data-based measures of teaching effectiveness and professional contribution to the school. Regular and rigorous evaluations of merit shall be the primary determinant of the allocation of salaries.

To remain competitive, salary and general compensation levels must remain competitive with those of peer institutions of comparable standards. Because the school is in a non-union organization in an industry that is heavily-unionized, we will endeavor to pay staff, particularly teachers, significantly more than they would be paid if they were employed in a traditional public school and were party to a Collective Bargaining Agreement. The average teacher at CCS is 27 years old and has a salary of $64,000.

SBCCS V seeks to improve scholar achievement beyond that of traditional public schools. As a mission-driven organization, teachers are held to higher standards and expectations. Consequently, we will pay our teachers a salary significantly higher than its analogue in the public schools. However, teacher pay is ultimately based on merit. First year teachers are not paid significantly more than first year teachers at public schools; however, high-performing teachers are given significant raises that over time aggregate to a far larger salary than their public school peers.

To set salaries, the School Director ultimately decides on the level based on the range provided by the Executive Director. We believe that this range will be above the average in the charter school industry but allows for significant growth based on merit. The School Director, DCI, Instructional Coaches, and Executive Director discuss and set salaries based on performance and the salaries of other staff members with comparable job descriptions and responsibilities.

The Board of Trustees determines the salary for the Executive Director. Any such decisions will be captured in the Board meeting minutes. Any changes to a staff member's salary will be approved by the Executive Director in writing or electronically and documented via a new contract. A copy of the new contract will be maintained in the employee file.

NOTE: If a Business Plan submitted in conjunction with this proposal fully addresses this request, applicants may reference the Business Plan response in lieu of addressing these questions in full in the proposal.

R-12d– Personnel Policies

d. Personnel Policies

Submit a copy of the proposed education corporation's personnel policies. The policies should include Act requirements for personnel such as fingerprint supported criminal background checks and receipt of the Code of Ethics, Conflict of Interest Policy (if separate), and Whistleblower Policy, and ensure compliance with applicable state and federal employment laws and regulations.

The hiring procedures described in the personnel policies must include (in addition to other antidiscrimination language that may be required by law) specific reference to the fact that the school will not discriminate on the basis of gender in compliance with Title IX of the Education Amendments of 1972, 20 USC § 1641, and 34 CFR § 106.9, and list the name, office address, and telephone number of the employee or employees appointed to provide information and investigate complaints pursuant to 34 CFR § 106.8.

HIRING POLICY

Classical Charter Schools is committed to providing equal opportunities for all persons and does not discriminate or retaliate on the basis of race, color, national origin, religion, sex, sexual orientation, marital status, age, disability, citizenship or legal immigration status, veteran status, or any other status protected by federal, state and local laws ("protected status"). This extends to volunteering, employment, services, and educational programs and activities.

South Bronx Classical Charter School V will hire employees either on a full-time or part-time basis. Full-time employees are eligible to enroll in the CCS Benefit Plan. Part-time employees, working fewer than 30 hours per week, are not. At any time, the Executive Director may alter or adjust the terms of an employee's employment. These terms include salary, benefits, job descriptions, titles, or other terms, only within the parameters established by the Board of Trustees.

All full-time hires must have at least 2 references and be at least working towards required certification.

REQUIRED DOCUMENTATION

- Cover Letter and Resume
- College Transcripts
- W-4
- I9
- Job Offer Letter

Most importantly, all employees are hired on an "at will" basis, and thus can be terminated, or can resign, for any cause.

All full-time staff are able to receive up to 8 sick or personal days. An employee absent for three continuous days without notifying Administration in writing, or without due reason, will be immediately terminated.

Full-time employees who have worked at SBCCS V for three (3) months are eligible to participate in the school's deferred compensation 401(k) program. Under such program, employees may opt to defer a portion of their current gross pay, having that portion of pay invested in accordance with applicable federal and state guidelines governing deferred compensation programs and with procedures established by the Executive Director. In accordance with federal guidelines, employees are subject to a maximum limit per year (currently 15% of annual salary or $19,000 in 2019) on deferred compensation.

Benefits:

Full-time employees will be offered medical and dental plans selected by the Executive Director. The terms of coverage will vary based on type of coverage (dependents, co-pay, etc.). SBCCS V expects to cover 97%-100% of the individual's medical and dental premiums. Employee contributions for health care and dental coverage will be automatically withheld from employees' semi-monthly paychecks.

Any SBCCS V employee that suffers injuries resulting from accidents that occur while performing duties on behalf of the school is covered by Worker's Compensation Insurance. Such employee must file a Worker's Compensation Insurance report with the Director of Business as soon as possible, and must file any other forms as required by law.

As required by New York State law, SBCCS V carries short-term disability insurance for its employees. Such insurance allows payment in the event of certain injuries, illnesses, or other disabilities occurring outside of the workplace, including pregnancy. Any employee wishing to claim disability must file appropriate reports and forms with the Operations Manager. Such employee is also responsible for filing any other necessary forms, applications, or other information as required by applicable government policies.

TERMINATION

All employees at SBCCS V are hired on an "at will" basis, and thus can be terminated, or can resign, for any cause.

The termination of employees is a difficult process for all staff and students. We believe that professionalism, adherence to law, dignity and sensitivity to all parties, including scholars, will minimize the stress and disruption during the transition. The Executive Director and School Director hold the authority to terminate an employee at will. Violations of the SBCCS V Codes of Conduct or other legal and ethical expectations outlined in the Staff Handbook may result in termination. Depending on the severity of the violation, termination may be immediate. There is no guarantee of any type of severance pay or any pay based on performance of concluding work.

RESIGNATION

To ensure a smooth transition of education services for our scholars, all personnel wishing to resign must provide a Letter of Resignation at least two weeks prior to the date of departure.

What to Submit:

- Submit the response to Request 12(a-c) as a Word® file named: R-12ac- Personnel.
- Attach Personnel Policies as a Word® file named: R-12d- Personnel Policies.

R-13a – Partner Organization(s)

a. Partner Information

Describe any partner organization(s) that will have a significant relationship with the proposed school. Explain the due diligence process used to select the partner(s) and its role in the development of this proposal. Include the following information in relation to the partner organization:

- The name of the partner organization(s);
- The name, address, phone number, and e-mail of a contact person(s);
- A description of the nature and purpose of the relationship;
- Names of proposed school board members affiliated with the organization(s); and,
- Evidence of the organization's ability to do business in New York.

NOTE: Applicants submitting a proposal in conjunction with a CMO do not need to include information about the CMO in this response, as such applicants must submit a separate Business Plan in conjunction with the proposal. Not all non-CMO partner organizations are required to submit a Business Plan with the school proposal. Please refer to the Business Plan Requirements section in the Introduction as well as Appendix C herein for further information. The Institute encourages applicants to contact our office well in advance of the application submission deadline to ensure a full understanding of the proposed legal structure and operational aspects.

N/A. SBCCS V does not have any prospective partner organization(s).

R-13b – Partner Commitment

b. Partner Commitment

For each new proposed partnership, provide a letter of intent or commitment from a bona fide representative of the partner organization(s) indicating the terms and extent of the organization's involvement with the proposed school.

If the school would provide compensation to the partner(s) for any goods or services (e.g., a lease or fee), provide a copy of the term sheet or draft contract and include an explanation about how such services will be provided to the school at or below fair market value.

N/A.

What to Submit:

- Submit the response to Request 13(a) as Word® file named: R-13a- Partner Organizations
- Attach the letter(s) of commitment from the partner organization(s) as a Microsoft Word® or Adobe® Acrobat file named: R-13b- Partner Commitment

R-14ad – Governance

a. Board Members

Provide a brief narrative describing the methods used to recruit and select board members. Use the Proposed Board Members table (see below) to identify a minimum of five proposed board members. In circumstances where one or two persons affiliated with a CMO will serve on the education corporation board, a total of at least six or seven trustees must be identified when the proposal is submitted. Refer to the Guidance Handbook for more details.

- Under the heading "Position on the Board," please note any leadership and/or affiliations that proposed board members would hold. For example: "Board Chair," "Treasurer," "CMO Representative," "Parent Representative," etc.
- Under the heading "Committee Affiliations (if any)," please note any committees on which a proposed trustee would serve (e.g., "Academic Committee," "Finance Committee," etc.).
- Include any currently vacant seats that the board would fill at a later date and specify the date. For example, if the board intends to add the head of the school's parent teacher organization as an ex-officio member after PTO elections in December of the first year, that member should appear in the table below as: Name – TBD; Position on the Board – PTO Representative; Committee Affiliations – TBD; Area of Expertise and/or Additional Role at School – Parent; and, indicate whether the role would be "Voting" or "Non-Voting and/or "Ex-Officio."

NOTE: Paid employees of the school, including administrators and teachers generally may not serve as voting members of the board, except in limited circumstances.

Name	Position on the Board	Committee Affiliation(s)	Expertise and/or Role at School	Voting	Ex-Officio
Stephen Baldwin	Trustee	Public Affairs (chair)	Law, former South Bronx educator	Yes	No
Kathryn Heleniak	Trustee	Public Affairs, Education	Fordham University Professor	Yes	No
Kevin Murphy	Trustee	Executive, Finance, Education (chair)	20 year veteran teacher, finance	Yes	No
James R. Maher Jr.	Vice Chair	Real Estate (chair), Executive	Real Estate	Yes	No
Veena Malpani	Treasurer	Development, Education	Law, Legal Compliance	Yes	No
Bob Torres	Trustee	Public Affairs	Bronx Resident, former Judge	Yes	No
Adrian Tonge	Trustee	Education	Finance, Business	Yes	No
Mariel Jenkins	Treasurer	Finance, Education	Investment Banking	Yes	No
Jake Elghanayan	Board Chair	Real Estate	Law, Real Estate	Yes	No

b. Education Corporation Board Roles and Responsibilities

Describe the roles and responsibilities of the education corporation's board of trustees including:

- Selecting school leader(s) (and partner or management organizations, if any);
- Monitoring school performance including fiscal performance, specifically detailing what that monitoring will entail and what sources of data it will use to assess that the school is meetings its mission, accountability, fiscal, and operations goals; and,
- Evaluating school leaders (and partner or management organizations including CMOs, if any) and holding them accountable for the achievement of the school's mission and goals.

The Board hires, evaluates, develops, and compensates the Executive Director, who manages day-to-day operations. The Board holds all monthly meetings in accordance with the New York Open Meetings Law. Note that meetings require a quorum of more than 50% of the Board. After each meeting, the Board Secretary drafts Board minutes within 10 days of each meeting.

The Board also has the following Committees:

- Executive: Charged with trustee nomination and overall governance.
- Finance/Audit: Coordinates the Board's financial oversight responsibilities by recommending policy to the Board, interpreting it for the staff, and monitoring its implementation. The committee also provides Board oversight of the annual budget and the organization's financial audit. This Committee also oversees facilities acquisition and financing.
- Education: Oversees the educational program and outcomes at its schools and analyzes the schools' educational outcomes and shares these results with the full Board regularly.
- Development: Leads the Board's participation in resource development and fundraising.

Each committee should meet twice annually. Meetings can be held remotely.

c. Education Corporation Board Design

Describe the rationale for the proposed design of the education corporation's board of trustees including

- Ex-officio members (voting and non-voting);
- Information to be received from the CMO, partner, school leadership, staff, or contractors as applicable;
- New trustee orientation process; and,
- Board/trustee training and development including the self-evaluation tool the board intends to use.

While there is no CMO contemplated here, all members of the Classical board of trustees have voting rights, and the by-laws do not contemplate ex-officio or non-voting membership. This would also be the case for South Bronx Classical Charter School V.

New trustees follow a process that includes an orientation document which outlines and summarizes Classical's history and general metrics. The process includes assuring that the new trustees are successfully vetted and meet all authorizer standards and requirements.

d. Stakeholder Participation

Explain how the board will effectively collaborate with parents, the community, and school staff in the governance of the educational corporation.

SBCCS V encourages and supports parental feedback, and Board meetings are an opportunity for families to share issues and concerns. Further, the board meetings are often within the school building, during the day, so families can voice their concerns and the board can tour and learn more about what is happening within the school.

R-14e – Bylaws

e. Bylaws

Provide a draft of the proposed education corporation's governing bylaws. Applicants should reference the Institute's Board Governance Guide in developing bylaws.

SOUTH BRONX CLASSICAL CHARTER SCHOOL V
BY LAWS

ARTICLE I
Name and Policy

Section 1.01. Name. The name of the education corporation is South Bronx Classical Charter School V ("SBCCS V" or "the Organization").

Section 1.02 Non-Discriminatory Policy. SBCCS V seeks diversity in its student/parent body, faculty, staff and administration and does not discriminate on the basis of race, color, religion, national or ethnic origin, sex, age, disability, marital status, sexual orientation, or any category protected by law, in its educational policies, employment practices and all other school administered procedures and programs.

ARTICLE II
Board of Trustees

Section 2.01. General Powers and Duties. The Board of Trustees shall have control of and manage the operations and affairs of SBCCS V, and it shall have all the powers customarily held by a Board of Trustees of a corporation organized under the Education Law of the State of New York. In exercising its powers and duties, the Board of Trustees shall establish and maintain policies and procedures for the operation of SBCCS V and shall oversee that such policies and procedures are carried out by the Executive Director and such other staff of SBCCS V as the Board of Trustees may employ or authorize the Executive Director to employ from time to time. The Board of Trustees shall have primary responsibility for seeing that SBCCS V is provided with the financial and other resources that the Board of Trustees deems appropriate for its proper operation.

Section 2.02. Number of Trustees. The Board of Trustees shall fix the number of trustees of SBCCS V from time to time, which shall not be less than five (5) and not more than thirteen (13). The trustees shall be elected ("Elected Trustees") pursuant to the provisions of Section 2.04 of these Bylaws.

Section 2.03. Term of Office. Unless otherwise provided by the Board of Trustees at the time a Trustee is chosen, term of office each Elected Trustee shall be a period of two (2) calendar years commencing with Regular Meeting following his or her election and continuing until a successor shall have been elected. If a Trustee is meeting all obligations required by the Board of Trustees, he or she shall not be limited as to the number of successive terms he or she shall be able to serve. The Elected Trustees shall be divided into two (2) classes, known as Class One and Class Two, for the purpose of staggering their terms in office. This will help balance continuity with new perspective. The terms of Elected Trustees shall be fixed so that the terms of one-third of such trustees (as nearly as possible) expire at the close of each Annual Meeting.

Section 2.04 Initial Trustees. The initial Trustees (the "Initial Trustees") are those persons named as Trustees in the Charter. The Initial Trustees shall serve until the earliest of (a) the first annual meeting of the Board held during 2006, (b) their resignation or (c) their removal from office pursuant to Section 2.13.

Section 2.05. Election of Trustees. Elected Trustees shall be chosen by the Board of Trustees as provided in subsections (c) and (d).

Nomination. Prior to June 1 in each academic year and at such other times as there may be vacancies among the Elected Trustees, whether by expiration of the terms of office, death, resignation, removal, or an increase in the number of Elected Trustees, the Executive Committee shall nominate candidates for the vacancies which it recommends be filled and shall specify the number of such vacancies which are to be filled by the Annual Election of Trustees pursuant to subsection (b) and the number which are to be filled by the Board of Trustees pursuant to subsection (c) at an Annual or Regular Meeting or at such other time as may be appropriate.

Eligibility. The Board may elect any person who in its discretion it believes will serve the interests of SBCCS V faithfully and effectively. No employee of the Organization shall be eligible to be nominated or serve as an Elected Trustee.

Annual Election of Trustees. At an Annual Meeting, or any subsequent Regular or Special Meeting, the Annual Election of Trustees shall take place. The Board of Trustees shall vote on the candidates nominated by the Executive Committee pursuant to subsection (a) to fill vacancies in the Elected Trustees, and each candidate shall be elected by the majority of the Board of Trustees. Voting shall be done by confidential ballot and the ballots shall be counted by the Secretary and confirmed by the Board Chair or the Vice Chair.

Board of Election of Trustees. If any of the Elected Trustees shall die, resign, refuse to act, or be removed from the Board of Trustees, or if an Elected Trustee's term of office shall expire, the vacancy or vacancies created thereby shall be filled by the vote of a majority of the whole Board of Trustees acting upon recommendation of the Executive Committee. Any trustee so chosen shall have all of the rights and powers of an Elected Trustee and shall serve for the balance of the unexpired term of the trustee whom he or she replaces. Upon recommendation by the Executive Committee, the Board of Trustees may create positions for additional Elected Trustees for such term not exceeding two (2) years, as the Board of Trustees shall determine. Any vacancy among the Elected Trustees created by increasing the number thereof shall be filled by vote of a majority of the whole Board of Trustees. Upon a two-thirds (2/3) vote, the Board of trustees acting upon the recommendation of the Executive Committee may abolish a vacant Elected Trustee seat, provided that the total number of trustees may not be less than that required by law or by these Bylaws; and further provided that the Board of Trustees files a certified copy of such action with the Board of Regents of New York State Education Department.

Section 2.07. Meetings of the Board of Trustees. The Board of Trustees may transact any business permitted by these Bylaws at an Annual, Regular or Special Meeting as provided below.

Annual Meeting. Unless otherwise provided by the Board of Trustees, the "Annual Meeting" of the Board of Trustees shall be held in June of each year.

Regular Meeting. The Board of Trustees may provide for holding of the "Regular Meetings" and may fix the time and place (which may be within or out of the State of New York) of such meetings. Regular Meetings shall be scheduled monthly.

Special Meeting. "Special Meetings" of the Board of Trustees shall be called by the Board Chair or Vice Chair of the Board of Trustees, at such time and place (which may be within or out of the State of New York) as may be specified in the respective notice or waivers of notice thereof. A Special Meeting shall be called by the Board Chair or a Vice Chair promptly upon receipt of a written or electronic request to do so from a majority of the Board of Trustees.

Notice. Notice of the time and place of an Annual or Regular meeting shall be given to each trustee either by messenger, regular mail, e-mail, or facsimile at least ten (10) days before the meeting. Notice of the time and place of a Special Meeting shall be given to each trustee either by messenger, regular mail, e-mail, or facsimile not less than three (3) days before the meeting or upon reasonable notice under the circumstances where 3 day notice is impractical. Notices by messenger, regular mail, e-mail, or facsimile shall be sent to each trustee at the number and/or address designated by him or her for that purpose. Oral or telephonic notices of meetings shall not be permitted. Neither the

business to be transacted nor the purpose of any Regular or Special Meeting need to be specified in the notice or waiver of notice of the meeting, unless otherwise specified in the Bylaws or required by law. Unless otherwise required requested by statute, notice of any adjourned meeting need not be given.

Section 2.08. Conflicts of Interest. The Board of Trustees affirms that the trustees, officers, administrators, faculty and other employees of SBCCS V have an obligation to exercise their authority and to carry out the duties of their respective positions for the sole benefit of SBCCS V. They should avoid placing themselves in positions in which their personal interest are or may be in conflict with the interests of SBCCS V. Where a potential conflict of interest exists, it shall be the responsibility of the person involved or any other person with knowledge to notify the Board of Trustees of the circumstances resulting in the potential conflict so that the Board of Trustees can provide such guidance and take such action as it deems appropriate. Areas of potential conflict of interest include financial interests, inside information, conflicting interests other than financial ones and gifts and favors. The Board of Trustees shall adopt a Policy on Conflicts of Interest to address these areas of potential conflict. In the event that any functions that are provided by institutional or contractual partners on behalf of the Organization result in a conflict of interest with any members of SBCCS V Board of Trustees, these Board members will recuse themselves from voting upon these matters.

Section 2.09. Quorum and Manner of Acting. At all meetings of the Board of Trustees, a majority of the whole Board of Trustees shall constitute a quorum for the transaction of business. Except as otherwise provided by statute or by these Bylaws, the act of a majority of the trustees present at any meeting at which a quorum is present shall be the act of the Board of Trustees. In the absence of a quorum, a majority of the trustees present at the time and place of meeting (or one trustee, if less than three (3) are present) may adjourn the meeting from time to time until a quorum shall be present.

Section 2.11. Resignations. Any trustee may resign at any time by giving written notice of such resignation to the Board of Trustees or the Board Chair. Unless otherwise specified in such written notice, such resignation shall take effect upon receipt thereof. If any trustee shall fail to attend three (3) consecutive meetings without an excuse accepted as satisfactory by the Board Chair, he or she shall be deemed to have resigned and the vacancy shall be filled as provided in section 2.05.

Section 2.13. Removal or Suspension. Any trustee may be removed or suspended from office by a majority of the whole Board of Trustees. Such action shall be taken only upon written complaint of misconduct, incapacity or neglect of duty submitted to the Board of Trustees. No trustee shall be removed without being provided with at least seven (7) days' notice of the proposed removal and copy of the complaint. If in the opinion of a majority of the whole Board of Trustees such complaint shall have been sustained, the accused trustee may be removed or suspended from office.

Section 2.14. Compensation of Trustees and Officers. Trustees, as such, shall not receive any salary for their services as trustees. Trustees shall serve without compensation.

Section 2.15 Evaluations. Evaluations of the Executive Director shall be conducted by the Executive Committee on an annual basis. Evaluations of the Board of Trustees shall be coordinated by the Executive Committee on an annual basis. Results of both evaluations, which may be in summary form, will be distributed to the Board of Trustees and the Executive Director. On-going informal assessments of the Executive Director and the board of Trustees shall be conducted on an as-needed basis determined by the Executive Committee.

ARTICLE III
Committees

Section 3.01. Standing Committees. The Board of Trustees shall establish and maintain the following "Standing Committees": Executive Committee, Finance/Audit Committee, Education Committee, and Development Committee.

Section 3.02. Ad Hoc Committees. The Board of Trustees may from time to time establish one or more "Ad Hoc Committees" with such name powers and functions as may be determined from time to time by the Board of Trustees.

Section 3.03. Committee Members: Chair. Members of committees shall be appointed annually by the Chair of the Board of Trustees, subject to ratification by the Board of Trustees in the first Regular Meeting of the Board of Trustees held after the appointment. Vacancies in the membership of any committee shall be filled by appointment by the Board Chair after consulting with the Chair, if any, of such committee. Except as otherwise provided in these Bylaws or by the Board of Trustees, the Board Chair of each committee shall be chosen by the Board Chair from among the trustee members of the committee.

Section 3.04. General Powers and Responsibilities of Committees. All matters that come before the Board of trustees shall be considered first by the appropriate committee. Any problem, concern, grievance or other matter referred to a committee shall be considered by such committee which shall consult with such interested parties as the committee deems appropriate. A committee to which any matter has been referred shall report on such matter to the Board of Trustees and, to the extent appropriate, make recommendations with respect thereto. Except as specifically provided by the Board of Trustees, each committee's powers are advisory to the Board of Trustees.

Section 3.05. Executive Committee. The Executive Committee shall consist of no less than four (4) members, including the Board Chair and Vice Chair and such other Trustees as may be designated by the Board of Trustees. The Board Chair shall be the Chair of the Executive Committee. The Executive Committee shall set the policy agenda, conduct evaluations of the Executive Director and of the Board of trustees, coordinate committee agendas, and set the agenda for the full Board of Trustees. The Executive Committee shall operate in place of the Board of Trustees during those times when the Board of Trustees does not or cannot meet. Between meetings of the Board of Trustees, the Executive Committee may take any action on behalf of the Board of Trustees that could authorized by a vote of the majority of the whole Board of Trustees or is limited to the Board of Trustees by law. An action taken by the Executive Committee may be subject to ratification by the Board of Trustees. A member of the Executive Committee shall record the minutes of each meeting and include a report on any actions taken. Such member shall forward the Minutes to the Secretary and the Secretary shall distribute the minutes of such meetings to the full Board of Trustees.

Section 3.06. Finance/Audit Committee. The Finance/Audit committee shall consist of no less than three (3) members. The Treasurer shall be the Chair of the Finance/Audit Committee. The Finance/Audit Committee shall be responsible for overseeing the preparation of budgets, financial reports and for supervising the management of SBCCS V's finances, including notifying the Board of Trustees of significant deviations from the approved budget. The Finance/Audit Committee shall review, analyze and recommend for approval the annual audit. On a periodic basis, the Finance/Audit Committee shall review investment policies, objectives, and performance.

Section 3.10. Education Committee. The Education committee shall consist of no less than three (3) members. The Education Committee shall be responsible for evaluating whether SBCCS V is adhering to its Charter and achieving its accountability goals. It will examine the results from city, state, national, and internally developed assessments, which are both criterion and norm-referenced. In addition, the Education Committee will meet with the Executive Director to analyze assessment data.

Section 3.11. Development Committee. The Development Committee shall consist of no less than three (3) members. The Development Committee shall be responsible for developing fundraising plans and initiatives for SBCCS V, to the extent necessary and strategically desirable. It will review the financial condition of the Organization and will seek funding for various aspects of the school's day to day operating needs as well as new projects.

ARTICLE IV
Officers

Section 4.01. Titles. The officers of the Board of Trustees shall be a Board Chair, one Vice Chair, a Secretary, a Treasurer and such other officers as may be appointed in accordance with these Bylaws.

Section 4.02. Election, Term of Office, and Qualifications. The Board of Trustees shall elect the Board Chair, one Vice Chair, a Secretary, a Treasurer and any other officers annually at the Annual Meeting or Regular Meeting designated for that purpose or a Special Meeting called for that purpose, except that officers appointed to fill vacancies shall be elected as vacancies occur.

Section 4.03. Subordinate Officers and Agents. The Board of Trustees from time to time may appoint subordinate officers or agents (including one or more Assistant Secretaries and one or more Assistant Treasurers) to hold office for such period, have such authority, and perform such duties as may be provided in the resolutions appointing them. The Board of Trustees may delegate to any officer or agent the power to appoint any such subordinate officers or agents and to proscribe their respective terms of office, authorities and duties.

Section 4.04. Resignations. Any officer may resign at any time by giving written notice of such resignation to the Board of Trustees or the Board Chair. Unless otherwise specified in such written notice, such resignation shall take effect upon receipt thereof.

Section 4.05. Removal or Suspension. Any officer elected or appointed by the Board of Trustees or by any officer of SBCCS V may be removed or suspended by the Board of Trustees at any time by a majority of the whole Board of Trustees. Such action shall be taken only upon written complaint of misconduct, incapacity or neglect of duty submitted to the Board of Trustees. No officer shall be removed without at least seven (7) days' notice of the proposed removal and a copy of the complaint.

Section 4.06. Vacancies. A vacancy in an office by reason of death, resignation, removal, disqualification or another cause shall be filled in the manner prescribed in section 4.02.

Section 4.07. The Board Chair. The Board Chair shall be the chief presiding officer of the Board of Trustees and shall perform such other duties as may be assigned to him or her from time to time by the Board of Trustees. The Board Chair shall preside at all meetings of the Board of Trustees and the Executive Committee and shall, when directed by the Board of Trustees, sign on behalf of SBCCS V all contracts, securities and other obligations of SBCCS V, when the authority to sign is not otherwise delegated by the Board of Trustees.

Section 4.08. Vice Chairs. The Vice Chair shall have such power and perform such duties as may be assigned by the Chair on the Board of Trustees. The Vice Chair shall in the absence or disability of the Board Chair or at the Board Chair's request, perform the duties and exercise the powers of the Board Chair.
Section 4.09. Executive Director. The Executive Director shall be the chief administrative officer of SBCCS V, and shall be appointed by the Board of Trustees to exercise control over the affairs of SBCCS V, subject to the supervision of the Board of Trustees.

Section 4.10. The Secretary. The Secretary shall keep the minute books of SBCCS V, be responsible for the minutes of the meetings of the Board of Trustees and in general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the Board of Trustees or the Board Chair.

Section 4.11. The Treasurer. The Treasurer shall have general custody of all money and securities of SBCCS V and from time to time shall render to the Board of Trustees, and to the Chair, upon request, a statement of the financial conditions of SBCCS V and all of his or her transactions as treasurer. In general, the Treasurer should perform all

duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him or her by the Board of Trustees or the Board Chair.

Section 4.12. Agreements, Contracts, Checks Requiring Signatures of Officers. All agreements, contracts, checks and other instruments of SBCCS V requiring an expenditure or imposing an obligation of more than $25,000 shall be executed by the Board Chair or the Treasurer. All agreements, contracts, checks and other instruments of SBCCS V requiring an expenditure or imposing an obligation of less than $25,000 may be executed by any one officer or by such other person or persons as may be designated by the Board of Trustees.

Checks and Notes. Except as otherwise specifically provided by Board resolution, checks, drafts, promissory notes, orders for the payment of money, and other evidence of indebtedness of the Corporation may be signed by the Board Chair, the Executive Director, or Treasurer. Such items for amounts of $25,000.00 or greater must be signed by two of these individuals.

ARTICLE V
Miscellaneous Matters

Section 5.01. Corporate Seal. The corporate seal of the Organization shall be circular in form and shall bear the name SBCCS V and the words and figures denoting its organization under the laws of the State of New York and otherwise shall be in such form as shall be approved by the Board of Trustees.

Section 5.02. Fiscal Year. The fiscal year of the Organization shall begin on the first day of July in each year and shall end on the thirtieth day of the following June.

Section 5.03. Conflict with Bylaws. To the extent a conflict exists between any provision in these Bylaws and Open Meetings Law, the Open Meetings Law shall control. Moreover, to the extent a conflict exists between any provision in these Bylaws and a provision in SBCCS V's Charter, the Charter shall prevail and control.

Section 5.04 Conflict with Charter. To the extent there are any conflicts between the terms of the charter of the Organization, and the terms of these by-laws, the terms of the charter will control.

Section 5.05. Indemnification.
To the maximum extent permitted by applicable law, as is in effect at the time of the adoption of these Bylaws or as amended from time to time, the Organization shall indemnify any person who was or is a party, or threatened to be made a party, to any threatened, pending, or completed action, suit, or proceeding, whether civil, criminal, administrative, or investigative, by reason of the fact that he/she is or was a trustee or an officer of SBCCS V's acting within the scope of his/her normal duties, against expenses (including attorney's fees), judgments, fines, and amounts paid in settlement actually and reasonably incurred by such person in connection with such action, suit, or proceeding. The Organization, however, will not indemnify a trustee or an officer against any costs incurred, in any action, suit, or proceeding if there is judicial determination that such person failed to act in good faith or that such acts were the result of active and deliberate dishonesty, and were material to the cause of action so adjudicated, or from which the person personally gained financial profit or their advantage to which he or she was not legally entitled. The foregoing right of indemnification shall not be deemed exclusive of any other rights to which a person seeking indemnification may be entitled under the Charter (as may be amended and/or restated from time to time) or any Bylaw, agreement, vote of disinterested Trustee, or otherwise. The Organization may maintain insurance, at its expense, to protect itself and any person described in subsection (a) against any expense, liability or loss, whether or not the Organization would have the power to indemnify such person against such expense, liability or loss under applicable law.

Section 5.06. Closure or Dissolution. In the event of closure or dissolution of the Corporation for any reason, transfer of students and student records, and disposition of the Corporation's assets shall occur as required under New York State Charter Schools Act (Article 56) of the Education Law of the State of New York.

Section 5.07. Amendments. These Bylaws may be altered, repealed, or amended and new Bylaws may be made by the affirmative vote of a majority of the Board of Trustees. Any proposed alteration, repeal, amendment or new Bylaws shall be provided to the Board of Trustees at least thirty (30) days in advance of the meeting at which such changes in the Bylaws will be voted on.

Section 5.08. Notice. Unless otherwise required by law or these Bylaws, notices required by these Bylaws may be given in writing, by messenger, regular mail, or email.

Amended June 21, 2016
Adopted September 13, 2006

R-14f – Code of Ethics

f. Code of Ethics and Conflict of Interest Policy

Provide a draft of the proposed education corporation's code of ethics and conflict of interest policy. The code of ethics must include a comprehensive and formal conflict of interest policy with specific procedures for implementing the policy and assuring compliance with the policy. The Code of Ethics and conflict of interest policy (which may be one document) must be written to apply not only to trustees but also to officers and employees of the school in conformity with N.Y. General Municipal Law. Please see the Board Governance Guide for more details.

The trustees, officers and employees of South Bronx Classical Charter School V ("SBCCS V") shall at all times be in compliance with the following code of ethics:

1. The Board shall conduct and direct the affairs of SBCCS IV and exercise all such powers as maybe exercised by SBCCS V, subject to all applicable laws, the SBCCS V Charter and these Bylaws. The Board may delegate the management of the activities of SBCCS V to others, so long as the affairs of SBCCS V are managed and its powers are exercised under the Board's ultimate jurisdiction.

2. Not more than 40% of the Board may be interested persons. An interested person is: (A) any person currently being compensated by SBCCS V for services rendered to it within the previous twelve (12) months, whether as a full or part-time employee, independent contractor or otherwise; or (B) any sister, brother, ancestor, descendant, spouse, sister-in-law or brother-in-law, mother-in-law or father-in-law, daughter-in-law or son-in-law of any such person.

3. Every Trustee has the right to participate in the discussion and vote on all issues before the Board and any committee of the Board of which the Trustee is a member, except that a Trustee shall be excused from the discussion and vote on any matter involving such Trustee relating to: (A) a self-dealing transaction; (B) a conflict of interest; (C) indemnification of that Trustee uniquely; (D) in the case of the Director or Co-Directors of SBCCS IV, such person's evaluation and compensation; or (E) any other matter at the discretion of a majority of the Trustees then present.

4. SBCCS V shall not engage in any self-dealing transactions, except as approved by the Board. A "self-dealing transaction" is one to which SBCCS V is a party and in which one or more of the Trustees has a material financial interest. Notwithstanding the foregoing, the following is not a self-dealing transaction and is subject to the Board's general standard of care: a transaction that is part of a public or charitable program of SBCCS V, if the transaction (A) is approved or authorized by the Board in good faith and without unjustified favoritism, and (B) results in a benefit to one or more Trustees or their families because they are in a class of persons intended to be benefited by the program.

5. Any Trustee, officer, committee member or employee having an interest in a contract, other transaction or program presented to or discussed by the Board or Board committee for authorization, approval or ratification, shall make a prompt, full and frank disclosure of such person's interest to the Board or committee prior to its acting on such contract or transaction.

The body to which such disclosure is made shall thereupon determine, by majority vote, from which such person shall be excused, whether a conflict of interest exists or may reasonably be construed to exist. If a conflict is deemed to exist, such person shall not vote on, use his or her personal influence in connection with, or be present during the discussion or deliberations with respect to, such contract or transaction, other than to present factual information or to respond to questions prior to the deliberations and vote.

6. Trustees representing any not-for-profit corporation proposing to do business with SBCCS V shall disclose the nature and extent of such business propositions.

7. No trustee, officer or employee of a for-profit corporation having a business relationship with SBCCS V shall serve as a voting member of the Board of Trustees for the duration of such business relationship, provided, however, that this provision shall not apply to the following:

A. Individuals associated with a partnership, limited liability corporation or professional corporation, including but not limited to doctors, accountants or attorneys;

B. Individuals associated with an educational entity (including but not limited to schools of education, but not including a for-profit educational management organization) some of whose faculty may be providing paid services directly or indirectly to such charter school;

C. Individuals associated with a bank, insurance, mutual fund, investment bank, stock brokerage, financial planning or other financial services organization.

8. Trustees shall avoid at all times engaging in activities that would appear to be unduly influenced by other persons who have a special interest in matters under consideration by the Board. If this occurs, the Trustee shall write a letter disclosing all known facts prior to participating in a Board discussion of these matters and the Trustee's interest shall be reflected in the Board minutes.

9. Trustees shall make all appropriate financial disclosures whenever a grievance of conflict of interest is lodged against them.

10. Trustees shall not accept any gift or privilege in connection with SBCCS V worth $50 or more that is not available to a similarly situated person unless that gift is for the use of SBCCS V.

11. SBCCS V Trustees, officers and employees shall never ask a subordinate, student or a parent of a student to work on or give to any political campaign.

R-14g- Complaint Policy

g. Complaint Policy

Provide a draft of the proposed school's complaint policy. The complaint policy must include procedures for handling formal and informal complaints under the Act including from staff, parents, employees, and contractors. It may also include procedures for handling informal complaints. Please refer to the Guidelines for Complaint Policies and Procedures available on our website.

A parent, as well as any other individual or entity, who believes that South Bronx Classical Charter School V has violated a term of its charter or applicable law may complain formally and seek relief. Typically, the first point of contact is the School Director; however, any person with formal complaints alleging a violation of the law or the school's charter *may* initiate complaints directly with the school's Board of Trustees without first contacting school staff or leadership. Any complaint that is about the School Director should be brought directly to the Executive Director. The School Director will make every effort to respectfully address each matter to the satisfaction of the individual or group that presented the complaint. The School Director can be contacted at: _____ . Any complaint that is about the Executive Director should be brought directly to the Board of Trustees.

If, after presenting a complaint to the School Director, the individual or group determines that the School Director has not adequately addressed the complaint, that individual or group may present the complaint to the Executive Director, who shall investigate and respond. The school's Executive Director can be contacted at Lester Long, [redacted]

If, after presentation of such a complaint to the Executive Director, the individual or group determines that the Executive Director has not adequately addressed the complaint, that individual or group may present the complaint to the Board of Trustees, who shall investigate and respond. Note: There is no deadline for filing complaints; however, it is recommended complaints be filed no less than one (1) week prior to Board meetings so that they can be addressed in a timely manner. Board meetings are typically held the third Tuesday of every month and the dates of regularly scheduled Board meetings will be prominently posted at the school. Complaints submitted later will be addressed at the subsequent meeting of the Board of Trustees. Emergency issues will be dealt with on an as-needed basis, with the Board responding at or prior to its next regular public meeting. Every effort will be made to respectfully address each matter to the satisfaction of the individual or group that presented the complaint. The Board of Trustees, as necessary, may direct the Executive Director or other responsible party to act upon the complaint and report to the Board. The Board of Trustees shall render a determination in writing within a reasonable amount of time. The Board of Trustees can be contacted through the Board Chair: _____.

If, after presenting such a complaint to the Board of Trustees, the individual or group determines that the Board has not adequately addressed the complaint, that individual or group may present the complaint to SUNY Charter Schools Institute, which may investigate and respond, and has the power and duty to issue appropriate remedial

orders as appropriate to the Board of Trustees. If, after presenting such a complaint to SUNY, the individual or group determines that the Charter Schools Institute has not adequately addressed the complaint, that individual or group may present the complaint to the New York State Board of Regents through the New York State Education Department's Office of Charter Schools.

R-14h – Board Member Resumes

h. Board Member Resumes

Submit current resumes for all board members that include each board member's professional experience and educational background.

JACOB NOURI ELGHANAYAN, ESQ.

[redacted]

EDUCATION

NEW YORK UNIVERSITY SCHOOL OF LAW, New York, NY J.D.,
May 2012

Honors: Moot Court Board

JOHNS HOPKINS UNIVERSITY SCHOOL OF ADVANCED INTERNATIONAL STUDIES, Washington, DC M.A.,
May 2012

BROWN UNIVERSITY, Providence, RI

B.A. in History, May 2006

EMPLOYMENT

[redacted]

NON-PROFIT BOARDS

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

JAMES R. MAHER JR.

[redacted]

[redacted]

PROFESSIONAL EXPERIENCE

[redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

[redacted]

- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]

[redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

[redacted]

- [redacted]

EDUCATIONAL BACKGROUND

[redacted]

[redacted]

- [redacted]

[redacted]

- [redacted]
- [redacted]
- [redacted] *nurture diverse students from NYC's most distressed neighborhoods (2015-Present)*

[redacted]

Adrian H. Tonge

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

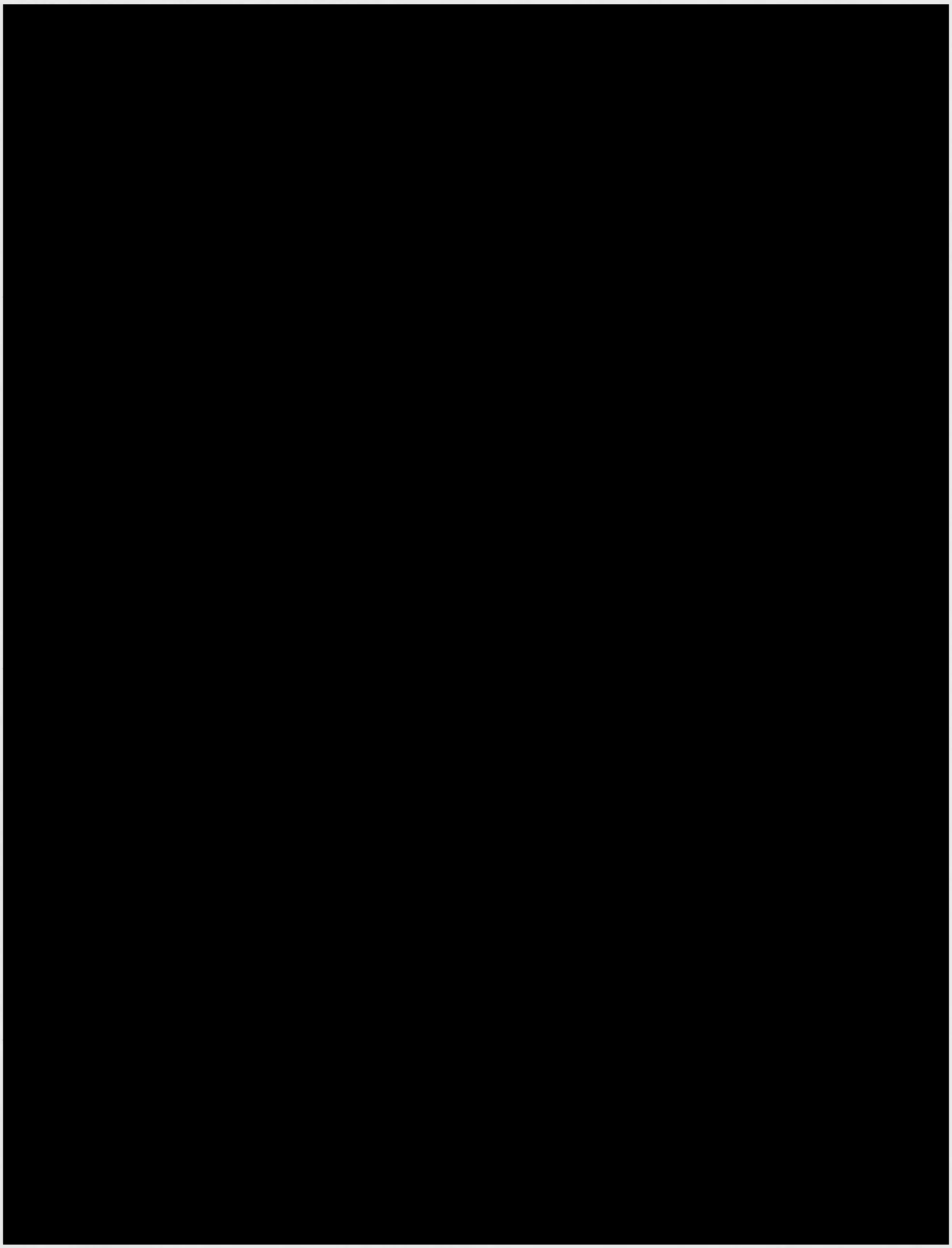
[redacted]

J. Kevin Murphy

[redacted]

EXPERIENCE:

[redacted]



KATHRYN MOORE HELENIAK

[redacted]

EDUCATION:
Ph.D. Art History (19th & 20th C., related minor: 18th C.)
Institute of Fine Arts, New York University, 1978
Diploma course in Art History, (19th & 20th C.), Courtauld Institute of Art
University of London (year long course,+ examination), 1968-69
B.A. History, University of Michigan, 1967

POST-DOCTORAL FELLOWSHIPS:
Mellon Fellow, Yale Center for British Art, Yale University, Spring 1981
American Council of Learned Societies, Travel Grant, 1989
Summer Faculty Fellowship, Fordham University 1991
Faculty Sabbatical Fellowship, Spring 1997 & Spring 2004
Faculty Sabbatical Fellowship, 2010-11
Bogliasco Fellow, Liguria Center for the Arts and Humanities, Spring 2011 Faculty Sabbatical Fellowship, Fall 2016

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

EXHIBITIONS:
Faculty Advisor and essay contributor, *John Trumbull's Drawings at Fordham University*, Walsh Library, Fordham University, Jan-June 2001
Editorial consultant, "Judy Pfaff," the American entry in the Sao Paolo Biennial Exhibition, October 1998, catalogue by Miranda McClintic, Curator
Curator for the Hong Kong entry in the Sydney Biennale 1984:"Eva Man-Wah Yuen:The Third Face"
"Chinese and American Cultural Interchange," American Library, Hong Kong 1983 (curated an exhibition of contemporary Chinese artists with American training or experience on behalf of the American Chamber of Commerce, Higher Education Liaison Committee of which I was a member, no catalog)

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

an[redacted]

CIVIC AFFILIATIONS:

[redacted])

Hon. Robert E. Torres, JSC (ret)

[redacted]

[redacted]

Retired Justice of the Supreme, State of New York, with over twenty-five (25) years' experience.

[redacted]

[redacted]

C. STEPHEN BALDWIN

[redacted]

RESUME OF EXPERIENCE

[redacted]

RELEVANT SKILLS

[redacted]

[redacted]

EDUCATION

MS (Elementary Education), *Hunter College* (**New York City Teaching Fellow; 3.96 GPA**); 2002

Certificate in Demography, *Princeton University Office of Population Research* **(Ford Foundation/Population Council Fellow**); 1972

JD (International Law), *Yale University Law School*; 1965

Graduate Study, Economics and International Relations, *American University*; 1962

BA (French Literature; **Benjamin Franklin American Studies Prize**), *Amherst College*; 1960

PROFESSIONAL MEMBERSHIPS

Washington D.C Bar Association, Population Association of America, International Union for the Scientific Study of Population, American Arbitration Association.

MARIEL JENKINS TAYLOR

[redacted]

[redacted]. *Passionate about client development and scaling new business initiatives to serve an evolving, global client base.*

[redacted]

[redacted]

- [redacted]
- [redacted]
- [redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

- [redacted]

[redacted]

[redacted]

[redacted]

- [redacted]
- [redacted] & 2013

Veena Malpani

[redacted]

EXPERIENCE

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

EDUCATION

American University, Washington College of Law, Washington, DC **May 2006**
Juris Doctor
GPA: 3.23; Activities: Civil Practice Clinic

Emory University, Atlanta, GA **May 2003**
Bachelor of Arts in Political Science
GPA: 3.45; Honors: Deans List, Pi Sigma Alpha (Political Science Honor Society)

Bar Admissions: Admitted in New York

SKILLS AND CERTIFICATIONS

Language Skills: Proficient in French
Licenses: Series 24 and 79

[redacted]

Fall 2019

R-14i– Board Members RFI Forms

I. Board Members Request for Information Forms

Each proposed board trustee must complete, sign, and attach the Request for Information Prospective Charter School Trustees ("RFI") form available on the Institute's website.

NOTE: Existing SUNY-authorized education corporations submitting an application to open a new school are not required to submit RFI forms for existing trustees.

What to Submit:

- Submit the response to Request 14(a-d) as Microsoft Word® file named: R-14ad- Governance.
- Attach Board Bylaws as a as Microsoft Word® file named: R-14e- Bylaws.
- Attach the Code of Ethics as a Microsoft Word® file named: R-14f- Code of Ethics
- Attach Complaint Policy as a as a Microsoft Word® file named: R-14g- Complaint Policy.
- Attach board member resumes as Microsoft Word® or Adobe Acrobat® files named: R-14h- Board Member Resumes.
- Attach board member RFI forms as Microsoft Word® or Adobe Acrobat® files named: R-14i- Board Member RFI Forms.

SUNY Charter Schools Institute
The State University of New York

Request for Information
Prospective Not-For-Profit Charter School Education Corporation Trustees

Guidance and Form

For Charter Schools Authorized by the State University of New York Board of Trustees

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Updated: February 2021

SUNY Charter Schools Institute
H. Carl McCall SUNY Building
353 Broadway
Albany, NY 12246
(518) 445-4250 (phone)
www.newyorkcharters.org

INTRODUCTION

Serving on a public charter school education corporation board is a position of great trust and responsibility. The law charges trustees with overseeing the education of all students enrolled in each school the not-for-profit education corporation has the authority to operate, the expenditure of public and private monies directed to the school(s), and, if applicable, the oversight of any charter/education management organization ("CMO/EMO").

The State University of New York Board of Trustees (the "SUNY Trustees") requires all new education corporation board members be approved by the SUNY Charter Schools Institute (the "Institute") pursuant to the terms of the education corporation's Charter Agreement. The Institute uses this Request for Information ("RFI") form as part of that process. Once the board elects a proposed trustee, the Institute requests the prospective trustee to complete the following form by providing answers to each of the items, and signing the certification.

Only in very rare cases does the Institute reject properly approved prospective trustees who have provided all information requested on this form. These cases are generally limited to prospective members who would have severe conflicts of interest in fulfilling their fiduciary or other duties as an education corporation trustee, who are proposed to be seated in violation of the education corporation's charter or by-laws, or whose criminal history would disqualify them. Questions related to conflict of interest may be addressed to the education corporation's counsel or counsel at the Institute.

Pursuant to New York's Freedom of Information Law ("FOIL"), any personal information listed on or attached to this form (including the Charter School Trustee Contact Information form) that would constitute an unwarranted invasion of personal privacy will not be disclosed (home address, email, telephone number, etc.).

1. REQUEST FOR INFORMATION

A. *Applicable Charter Agreement Provisions*

The following image shows the applicable provision from the Model Charter Agreement (available at http://www.newyorkcharters.org/wp-content/uploads/Model-Charter-July-2017.pdf), which is the same or very similar to that of each education corporation's Charter Agreement:

- Section 2.3, *Selection of New Education Corporation Board Members.*

> 2.3 Selection of New Education Corporation Board Members. All Corporate Trustees shall possess appropriate qualifications for membership on the Education Corporation Board, as such qualifications are set forth in the Terms of Operation, and shall be seated pursuant to the following procedures. Prior to the appointment or final election of any new Corporate Trustee, the Education Corporation Board must submit to the Trustees (pursuant to a duly approved resolution of the Education Corporation Board) the name of the proposed Corporate Trustee and such individual must timely provide to the Trustees, in writing and/or in person, such background information as the Trustees shall require (the "**School Trustee Background Information**"). Within forty-five (45) days of receiving the name of the proposed Corporate Trustee and the School Trustee Background Information, the Trustees shall in writing reject or approve such individual. In the event that the Trustees do not provide in writing an approval or rejection within the forty-five (45) day time period, the proposed Corporate Trustee may be seated so long as such action would be consistent with the By-laws and any other applicable Terms of Operation. A failure by the Education Corporation or the proposed Corporate Trustee to timely provide the School Trustee Background Information to the Trustees shall be grounds for his or her rejection.

B. *Applicable Laws and Regulations*

None.

C. *Discussion*

In order to legally seat a person on a charter school board, the following procedures should generally be followed as well as any specific provisions contained in education corporation's by-laws:

- When a board seat becomes vacant or is created, the board (by committee or otherwise) should seek nominations for a person to fill the vacant seat with appropriate qualifications per the Charter Agreement *and* by-laws requirements.

- The board secretary or other administrator should review the by-laws to determine the proper number of trustees that may be seated on the board, and that the number is within the proper range (e.g., 7-11). If the board has more members than the upper end of the range, a request to amend the by-laws must be made to the Institute or the

education corporation may not fill the seat. In cases where the board is expanding the number of trustees (as opposed to filling a vacancy) the board must do so prior to the election of the proposed trustee (even if being voted at the same meeting) and clearly reflect same in the minutes.

- Note: the legal limits on board size are 5 minimum and 25 maximum, although best practice has shown boards of 11 or under to be effective.

- The board secretary or other administrator should review the following to determine the proper qualification of the prospective board member:

    - Charter Agreement section entitled "Governance; Education Corporation Board; By-laws" (Section 2.2 in recent charters) for the following:

        - compliance with the 40% rule (no more than 40% of the school board may be affiliated with any single entity unless the school has received a waiver from the SUNY Trustees); and,

        - compliance with provisions prohibiting or restricting board membership for persons associated with a CMO/EMO.

    - Charter Agreement Exhibit A, "Additional Assurances and Terms," if any, which may contain restrictions on board membership or a waiver thereof;

    - Charter Agreement Exhibit A, "Terms of Operation;" any sections dealing with governance;

    - By-laws, which may:

        - state what type or "class" of trustee must be elected, e.g., parent, teacher representative, community member;
        - state any conditions that must be met prior to the election or nomination of a proposed trustee (vote of the parent/teacher organization; vote of partner organization, etc.);
        - direct how the trustee will be elected or appointed (super-majority vote, vote of corporate member, etc.); and/or,
        - state how long the term of a trustee will be. When vacant seats are filled, the new trustee serves for the remainder of the prior trustee's term. When new seats are created, the board, or other methodology in the by-laws, may dictate the length of the term, which may be staggered with other terms. It is good practice for the secretary to keep a multi-year elections calendar to track each trustee's term.

The education corporation board or corporate member elects or appoints the *prospective* trustee at a duly convened meeting of the applicable board with a quorum and following any by-laws restrictions on elections. The Institute will approve or reject such proposed

trustee in writing within 45 days of submission of *all* of the required documentation:

- complete *Request for Information, Prospective Charter School Education Corporation Trustee* ("RFI form");
- resume or brief biographical information;
- updated list of board of trustees; and,
- evidence of proper election (e.g., signed resolution or meeting minutes reflecting vote).

If the Institute takes no action within the 45 day period, the person may be seated as a school trustee.

D. *Responsible Tasks*

- Submit a copy of the signed resolution electing the prospective trustee or the meeting minutes showing such election.
- Submit the original *RFI form*. After each prospective trustee reviews the by-laws, code of ethics and any conflict of interest policies of the education corporation, the board secretary or administrator should have each prospective trustee complete a RFI form, which the education corporation or proposed trustee must submit to the Institute together with a resume or brief biographical information.
- Submit an updated board list to the Institute reflecting the proposed trustee's election.
- After approval by the Institute, the board secretary or other administrator should inform the new trustee, and all trustees, of his or her official seating on the board. The trustee may now be counted for purposes of quorum and vote.
- As a reminder, the education corporation must notify the SUNY Trustees within five (5) business days of any of the following education corporation trustee actions: removal; resignation; expiration of term without re-election; or, otherwise leaving the board.

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Classical Charter Schools
2. Full name: Jacob Nouri Elghanayan

   Home Addres [redacted]

   Business Nam

   Home telepho

   Work telepho

   E-mail addres

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☐ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

   U [redacted]

1

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:

I am college friends with James Maher

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☐ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☐ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would begin by informing the other members of the Executive Committee and then consult with our lawyer on next steps, which would presumably include informing our authorizer and performing a full investigation.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Jacob Nouri Elghanayan, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Classical of Charter Schools is true and correct in every respect.

[redacted]

11/29/2023

Date

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   South Bronx Classical Charter School V
2. Full name: James R. Maher Jr.

   Home Addr [redacted]

   Business N

   Home telep

   Work telep

   E-mail addr

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☐ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

   [redacted]

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

- [■] Does not apply to me, my spouse or family.
- [ ] Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

- [✔] None.
- [ ] Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

- [✔] None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would raise the issue with the rest of the board and Executive Director and have the potential conflict investigated. If through the course of that investigation it was determined that there was self-dealing, then I would recommend the immediate removal of the conflicted Board Member.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, James R. Maher Jr., certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of South Bronx Classical Charter School V is true and correct in every respect.

[redacted]

12/1/2023

Date

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   South Bronx Classical Charter Schools
2. Full name: Adrian Tonge

   Home Addre [redacted]

   Business Nar

   Home teleph

   Work teleph

   E-mail addre

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☐ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

■ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

Will alert the appropriate authority entities.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Adrian Tonge, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of South Bronx Classical Charter Schools is true and correct in every respect.

[redacted]

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Classical Charter Schools, School V

2. Full name: Joseph Kevin Murphy

   Home Addre[redacted]

   Business Na[redacted]

   Home telep[redacted]

   Work teleph[redacted]

   E-mail addre[redacted]

3. A brief educatio[redacted]
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☐ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

   Classical Charter Schools [redacted]

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:
Serving as a Trustee of Classical Charter Schools since 2006, I have come to know all of the trustees as colleagues. These will be the same trustees applying for a provisional charter for a fifth school.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☐ I / we do not know any such employees. ☑ Yes.

Details:
Lester Long, Executive Director, [redacted]

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☐ I / we do not know any such persons. ☑ Yes.

Details:
As a Trustee and member of the Finance Committee, I have met our banking [redacted]

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

■ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☐ None.

☑ Yes.

Details:

[redacted]

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

Suspicion should lead to further investigation for evidence of such self-dealing, first by the auditors, then by attorneys. If credible evidence supports such a conflict of interest, it should be reported to the authorizer and the NYS Office of Charter Schools. If criminal allegations are made, they should be referred to the Bronx District Attorney. Finally, an internal review should be made to ascertain how the fraud was perpetrated and how best to prevent any further such occurence.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Joseph Kevin Murphy, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Classical Charter Schools is true and correct in every respect.

[redacted]

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   South Bronx Classical Charter School V
2. Full name: Kathryn Moore Heleniak

   Home Address [redacted]

   Business Name

   Home telepho

   Work telephor

   E-mail address

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☒ Yes.

Details:
C. Stephen Baldwin,also [redacted] ools, is a personal friend.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☐ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☐ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would contact the Board Chair (if not involved), the Executive Director (if not involved), our retained attorney, and the NYSED to both verify my understanding of the situation and the applicable laws and regulations, and to ensure that an investigation is done as soon and transparent as possible.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Kathryn Moore Heleniak, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of South Bronx Classical Charter Schools is true and correct in every respect.

[redacted]

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

   South Bronx Classical Charter Schools

2. Full name: Robert E. Torres

   Home Address: [redacted]

   Business Name ar

   Home telephone

   Work telephone N

   E-mail address:

3. A brief educational ar
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☐ Does not apply to me. ☑ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

   [redacted]

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☐ I / we do not know any such employees. ☑ Yes.

Details:
Daugther was a teacher of a parochial school

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☐ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☐ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family.

☐ Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

☑ None.

☐ Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

☑ None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

Would present the issue to other members of the board and the Execitive Director. If the situation continues would advise state authorities.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

None

Certification

I, *Robert E. Torres*, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of *South Bronx Classical Charter School* is true and correct in every respect.

[redacted]

Request for Information
Prospective Charter School Education Corporation Trustee
Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

2. Full name: C. Stephen Baldwin

   Home Address:

   Business Name and Address:

   Home telephone No.:

   Work telephone No:.

   E-mail address:

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

- [■] Does not apply to me, my spouse or family.
- [ ] Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

- [✓] None.
- [ ] Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

- [✓] None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I ' d discuss with Board Chair, who would then take any appropriate follow up action required, unless s/he were the person implicated, in which case the Board Vice Chair would be consulted.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, C. Stephen Baldwin, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Classical Charter Schools is true and correct in every respect.

[redacted]

Request for Information
Prospective Charter School Education Corporation Trustee Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.
   Classical Charter Schools
2. Full name: Mariel Jenkins Taylor
   Home Addre[redacted]
   Business Na[redacted]NY
   Home telep[redacted]
   Work teleph[redacted]
   E-mail addre[redacted]
3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.
4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.
5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☑ I / we do not know any such trustees. ☐ Yes.

Details:

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☐ I / we do not know any such employees. ☑ Yes.

Details:

Sydney Jenkins- Sister

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

3

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the education corporation does not contact with a management company or charter management organization.

☑ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ N/A.

☑ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☐ N/A.

☑ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

- [x] Does not apply to me, my spouse or family.
- [ ] Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

- [x] None.
- [ ] Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

- [x] None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Mariel Jenkins Taylor, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Classical Charter Schools is true and correct in every respect.

[redacted]

Date

Request for Information
Prospective Charter School Education Corporation Trustee Form

Background

1. Name of charter school education corporation for which you intend to serve as a trustee.

   Classical Charter Schools

2. Full name: Veena Malpani

   Home Address: [redacted]

   Business Name

   Home telephor

   Work telephon

   E-mail address:

3. A brief educational and employment history (or you may attach a resume):
   ☑ Resume attached.

4. Please affirm that you will be at least 18 years old by the date of appointment to the education corporation's board. ☑ I affirm.

5. Please indicate whether you currently or have previously served on a board of a school district, another charter school education corporation, a non-public school or any not-for-profit corporation. ☑ Does not apply to me. ☐ Yes.

   Name(s) of School/Not-for-Profit Corporation(s):

6. Please indicate if you have ever been convicted of a misdemeanor related to honesty or trustworthiness, or a felony. If the answer to this question is yes, please provide details of the offense, the date, disposition, etc.

☑ Does not apply to me. ☐ Yes.

Details:

7. Please indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or district attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or not-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☑ Does not apply to me. ☐ Yes.

Details:

Conflicts

8. Please indicate whether you or your spouse knows any of the other charter school education corporation trustees, or prospective or former trustees. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☑ Yes.

Details:

I worked with Justin Bateman, the husband of Ingrid Bateman, a former trustee.

9. Please indicate whether you or your spouse knows any person who is, or has been in the last two years, an employee of the education corporation. If so, indicate the precise nature of your relationship.

☑ I / we do not know any such employees. ☐ Yes.

Details:

10. Please indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the education corporation or any of the schools it has the authority to operate (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the education corporation.

☑ I / we do not know any such persons. ☐ Yes.

Details:

11. Please indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the education corporation or any school it has the authority to operate. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ I / we do not anticipate conducting any such business. ☐ Yes.

Details:

12. If the education corporation or any of the schools it has the authority to operate contracts with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you or your spouse know any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☑ Not applicable because the education corporation does not contact with a management company or charter management organization.

☐ I / we do not know any such persons.

☐ Yes.

Details:

13. If the education corporation contracts with an educational service provider including a charter management organization, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, financial, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☑ N/A.

☐ I / we have no such interest.

☐ Yes.

Details:

14. If the education corporation or any of the schools it has the authority to operate is partnered with an educational service provider including a charter management organization, please indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, please indicate the precise nature of the business that is being or will be conducted.

☑ N/A.

☐ I / we or my family do not anticipate conducting any such business.

☐ Yes.

Details:

15. Please indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization which filed an application in conjunction with the education corporation, i.e., is partnered with the education corporation. (For the identity of all such organizations, please consult with the chair of the board.) To the extent you have provided this information in response to prior items, you may so indicate.

- [■] Does not apply to me, my spouse or family.
- [ ] Yes.

Details:

16. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the education corporation board. Please note that being a parent of a school student, serving on another charter school's board or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee.

- [✔] None.
- [ ] Yes.

Details:

17. Please indicate any individual, business, corporation, union association, firm, partnership, committee, proprietorship, franchise holding company, joint stock company, trust, non-profit organization, or other organization or group of people doing business with the education corporation, and in which such entity you and/or your immediate family members have a financial interest or other relationship.

- [✔] None.

☐ Yes.

Details:

18. Please indicate how you would handle a situation in which you believe one or more members of the education corporation's board are involved in self-dealing (working for their own benefit, or the benefit of their friends and family). Please note that simply confronting the involved trustee is not usually a sufficient answer.

I would inform other members of the Executive Committee, and consult with our lawyers on the next steps, which likely would be performing an investigation.

Other

19. Please affirm that you have read the education corporation's by-laws and conflict-of-interest policies (Code of Ethics). ☑ I affirm.

20. Please provide any other information that you feel pertinent to the SUNY Charter Schools Institute's review.

Certification

I, Veena Malpani, certify to the best of my knowledge and ability that the information I am providing to the State University of New York/Charter Schools Institute in regards to my application to serve as a member of the board of trustees of Classical Charter Schools is true and correct in every respect.

[redacted]

11/30/2023

Date

R-15 – District Relations

a. Relationship Strategies

Provide strategies for establishing and maintaining an ongoing relationship with the local school district including any foreseen opportunities or challenges. Include any evidence of efforts taken to establish a relationship with the district and the results of such outreach.

SBCCS V will establish a positive relationship with the local school district by maintaining clear channels of communication and welcoming faculty and families to any community-based events we coordinate; these might include student art shows, musical theater performances, or winter coat drives.

b. School Partnerships

Provide a description of low-performing schools in the area where the proposed school intends to be located and explain how the school might partner with those schools to share best practices and innovations.

In Section/Attachment 1 we reference four district schools near a prospective location for SBCCS V.

SCHOOL	ELA PASS RATE	MATH PASS RATE
ANTONIA PANTOJA PREPARATORY ACADEMY	36.2	24.7
P.S. 138 SAMUEL RANDALL	32.4	33.6
P.S. 100 ISAAC CLASON	22.8	25.6
SOUNDVIEW ACADEMY FOR CULTURE AND SCHOLARSHIP	20.1	8.9

With pass rates in the 20-30% range, these schools would likely benefit from some level of support from our organization. We can offer school tours so that other school leaders can see how we structure our day and execute lessons. We may also be able to invite faculty from local schools to join our monthly Professional Development sessions to share best practices.

What to Submit:

- Submit the response to Requests 15(a-b) as a Word® file named: R-15- District Relations.

R-16ac- Facilities

Locating a suitable school facility is a critical and significant task. The Institute encourages all applicants to consult the following resources as you develop your responses to each portion of Request 16:

- NYSED'S Facilities Planning Website
- The Institute's Facilities Planning Webpage and Reporting Guidance
- NYC Charter Center's Guide to the Facility Access Process for Co-location and Private Space (for NYC applicant groups)

a. Facility Needs

Describe the facility needs of the proposed school for each year of the charter term including any unique features necessary to implement the school design and academic program including:

- The desired location of the school facility;

- The number of general education classrooms required each year;
- Any additional classroom space required for special education or ELL services, labs, specialty classes, and intervention or enrichment programs;
- Space requirements for administrative functions, food services, a nurse's office, and physical education; and,
- If the applicants intend to offer a residence program for students, describe the facility requirements to support this program including overnight staffing, and include specific and detailed information regarding the number of residence rooms, configuration, restrooms, food service, and other facility-related needs.

SBCCS V is looking for school facilities in the South Bronx which, should charter be granted, will be educating scholars starting in Fall 2025Any such facility must meet the needs of all scholars and thus be ADA-Compliant and fully accessible for scholars and visitors with disabilities.

As with the vast majority of charter schools, we expect to occupy private space. We will be subject to NYC zoning, land use, and building regulations for non-public schools. We are allowed by zoning to occupy a facility in a residential area subject to certain restrictions. We would like to have an "all-purpose room" that would serve as a gymnasium, cafeteria, and auditorium.

Ideally, we would own a building, but as with most schools, we expect to enter into a long-term lease agreement. SBCCS V will apply for rental assistance from the New York City Department of Education.

b. Facility Selection

Describe the efforts to date to secure a facility for the school including

- If the applicants have identified a facility, a description of the facility and how it meets the school's needs including its location and whether it is new construction, part of an existing public or private school building, or must be renovated for use;
- How the proposed facility will be able to meet NYSED (outside of NYC), or New York City Department of Buildings School Use (sometimes denoted as use "G"), and state sanitary specifications by the commencement of the first year of operation;
- If the applicants have not identified a facility, explain the plans for securing a suitable facility and preparing it for use by the time the school would open (including assuring that it meets specifications). Also, explain any contingency planning including the associated costs;
- If an applicant seeks to be located in any public school facility as a primary option, he or she must clearly state these plans and indicate that a facility has not been located unless all necessary governmental approvals for the facility have been obtained;
- If co-located space is the primary facility plan and the budget template has been completed under that assumption, but the applicant would also investigate other options, discuss the alternative plans in a narrative. If the Institute deems it necessary, a budget reflecting the secondary assumptions may be requested; and,
- If another organization is assisting the applicants in obtaining facilities, provide information about the organization.

Private Transaction

Most surveys show space in the hub of the South Bronx costing $21 a square foot in 2010; however, we estimate that we should expect to pay $30-35 per square foot. We are, however, looking into purchasing

a building as a strategic real estate investment to ensure a stable, long-term commitment to the community. In addition, we are examining ways in which the Federal, State, and City governments may offer financial incentives for investment in the area. Two of our board members are real estate developers and are currently analyzing these possibilities.

As noted above, we have researched several private options and are developing a portfolio of potential buildings that are of both the location and design that are appropriate for SBCCS V's mission.

Cost Estimates

Using an assumption of 85 total square feet per enrolled student, SBCCS V will require about 10,000 square feet our first year. Upon full enrollment, SBCCS V will need about 40,000 square feet in total. See table below.

The school anticipates enrolling 124 students in its first year and 186 in its second. The number of floors will depend on the specific building arrangement, but ideally each floor would hold 2 or 3 grades. Average class size will range from approximately 23-25 students in kindergarten to 18-22 students in fifth grade. The table below summarizes our enrollment and facility's needs. Please note that we will also be building an "all-purpose room" that would serve as a gymnasium, cafeteria, and auditorium. We expect our classrooms to be approximately 700 to 900 square feet.

Year	Academic Year	Grades	Total Enrollment	Total Classrooms*	Total Facilities**	Facilities Cost ($)^^
1	2020-2021	K- 1	124	8	10,200	306,000
2	2021-2022	K- 2	186	12	15,045	451,350
3	2022-2023	K- 3	248	15	19,635	589,050
4	2023-2024	K- 4	310	18	23,970	719,100
5	2024-2025	K- 5	372	20	28,050	841,500
6	2025-2026	K- 6	410	22	31,960	958,800
7	2026-2027	K- 7	452	24	34,850	1,045,500
8	2027-2028	K- 8^	480	26	38,420	1,152,600
* Including 3 non-core classrooms for Science, History, and tutoring.						
** In square feet, assuming 85 square feet per student.						
^ Full Enrollment.						
^^ Assuming $30 per square foot.						

c. Facility-Related Conflicts of Interest

If the charter school education corporation or its CMO or partner organization would own or lease a facility, provide a description of the ownership or lease arrangement indicating specifically any potential conflicts of interest and arrangements by which the education corporation would manage or avoid such conflicts. Note that in cases where there is a potential conflict, the Institute will likely require a fair market valuation of the cost of the facility supported by independent appraisers. Additionally, no education corporation trustee may have an ownership interest in a facility.

We do not contemplate a situation where the education corporation or CMO would own or lease a facility to SBC V. This is not expected, or wanted, and we would speak to our authorizer in this case. The board does not own real estate or plan to own real estate that would be used.

R-16d – Facility Documents

d. Additional Facility Information

Provide Information such as blueprints, maps, certified estimates, etc., as well as documentation of any commitment (e.g., a deposit, written assurance, lease, etc.), to use a particular facility, as part of this response.

NOTE: If the applicant has identified a facility, include certification from an architect that the proposed facility meets NYSED or NYC specifications, as applicable, by the date the school would commence instruction and the cost of bringing the facility into compliance with the specifications. These costs must be accounted for in the proposed startup budget.

What to Submit:

- Submit the response to Request 16(a-c) as a Word® file named: R-16ac- Facilities.
- Attach supporting documents as Word® or Adobe Acrobat® files named: R-16d- Facility Documents

While we have relationships with real estate developers and have prospective buildings we are looking into, we do not have any formal commitments currently.

R-17 – Food Services

Describe the plans for food services the school will provide. Indicate if the school will participate in the Federal school lunch and/or breakfast program. While food service plans are at the discretion of the school, please note that many school districts allow charter schools to participate in district food service contracts or programs.

What to Submit:

- Submit the response to Request 17 as a Microsoft Word® file named: R-17- Food Services.

SBCCS V will offer breakfast, lunches, and snacks in compliance with all requirements of the National School Lunch Program served in a manner consistent with State and Federal guidelines.

About 85% students in schools in the South Bronx are eligible for Free or Reduced Lunch, as administered by the United States Department of Agriculture. Thus, under the Provision II program of the National School Lunch and Breakfast Program, SBCCS V plans to provide free meals to all scholars, regardless of the ability to pay. To comply with the program, the school will retain all records and create a database with scholar data, meal nutritional compliance, and all meal pricing.

While the school intends to have its own cafeteria, if the building does not have such facilities, the school will arrange for all food to be prepared off-site and delivered to scholars in the classroom. SBCCS V may hire an independent food service provider or the New York City Department of Education to prepare the food and deliver it appropriately.

R-18 – Health Services

Describe the plans for health services the school will provide including provision for a school nurse, medical space and equipment, procedures for proper collection and storage of immunization and medical records, immunization records checks, and procedures for provision of medication to students who require it within applicable law. Applicants may wish to refer to NYSED's School Health Services information in developing this response.

What to Submit:

- **Submit the response to Request 18 as a Microsoft Word® file named: R-18- Health Services.**

SBCCS V will comply with all health services requirements applicable to public schools, including Education Law §§ 901-914 and §136.2(d)(2) of the Commissioner's Regulations. To the extent possible, SBCCS V will provide on-site health care services similar to those services available to children attending all New York City public schools in the related district, including a part-time nurse, who is funded in the budget to supplement the level of health services mandated to be provided in accordance with §2853(4)(a) and §912 of the Education Law.

School staff will work with the Department of Health, the host district, and other appropriate authorities to provide these services. Health services will include

- physical examinations upon enrollment;
- annual vision screening testing for all new scholars. Per §905 of New York Education Law, the components of vision testing shall include distance acuity, color perception, and near vision;
- annual scoliosis (spinal) screening test for all scholars ages 8 through 16;
- maintenance of cumulative health records;
- emergency care of ill or injured scholars;
- compliance with and enforcement of mandatory immunization requirements; and
- on site automated external defibrillator (AED) equipment to ensure ready and appropriate access for use during emergencies and SBCCS V shall ensure that at least two (2) staff members are trained in the operation and use of such equipment for use in the school and at any school-sponsored events at other locations.

Maintenance and Storage of Cumulative Health Records

SBCCS V will store all health records for enrolled scholars. Cumulative scholar health records shall be held until the scholar is 27 years old. Immunization records will be held 10 years after the immunizations were administered.

Immunization Requirements

New York State law currently requires that each student entering its public schools have a Certificate of Immunization at the time of registration or not later than the first day of school. A review of student immunizations requirements and the proper supporting documents shall be completed for all new scholars. New York State immunization requirements include

- Diphtheria [Toxoid Containing Vaccine (DTP, DtaP) 3 doses];
- Polio [(IPV)(OPV3 OPV or 4 IPV];
- Measles/Mumps/Rubella [(MMR) 2 doses of measles containing vaccine and 1 dose each of mumps and rubella (preferably as MMR)];
- Hepatitis B;
- Varicella – 1 dose.

Before a child can be permitted to attend school, the family must present documentation that their child has received all required doses of vaccines or that their child has received at least one dose of each of the required vaccines and is waiting to receive the subsequent doses at the appropriate time intervals. Parents may waive immunization in accordance with Public Health Law and exceptions to immunizations shall be granted if a licensed physician or nurse practitioner certifies such immunization may be detrimental to the student's health, or if the student's parent or guardian holds genuine and sincere beliefs, which may include religious beliefs, contrary to such immunization [see § 2164 (8) and (9) of the Public Health Law].

Medications

If a scholar requires medication during school hours, the distribution of the medications will be supervised by the Operations Manager or Nurse under the following guidelines:

- Prescription medications must be supplied in the original pharmacy container.
- The container must be identified with the following information: Name, Name of Medication, Doctor's Name and Phone Number, Pharmacy and Phone Number.
- Parents/guardians must sign the appropriate administration forms.
- Non-prescription medications must also be supplied in the original container and must be accompanied by written instructions from a physician and consent from parent/guardian

The Operations Manager will be the primary person designated person and authorized to administer medication in the absence of the school nurse. The Dean of Students will be the back-up person(s) to the Operations Manager. All medication must be placed in a locked box in the Main Office. In order to administer any prescribed medication to a scholar, there must be a doctor's note on file. All over the counter medications require a note signed by the parent with directions. Furthermore, a log will be kept on file that indicates the following: Name, Name of Medication, Date, Time, and Who Dispensed Medication.

Scholars are responsible for coming to the Main Office to receive their medications at the appropriate time. Scholars are not allowed to have medications in their possession or in their lockers. This includes any over-the-counter medications.

R-19- Transportation

Describe the transportation arrangements for students including arrangements for students who would not qualify for public school transportation under Education Law § 3635. Also, describe any supplemental transportation arrangements planned with sending school districts. Include a discussion of any transportation that does not align with district options including days when the proposed school would be in session but the district schools would not be in session. This response should also include discussion of how the school would communicate the requirement that parents of students seeking transportation services must submit a written request no later than April 1st to the school district in which they reside, including how this would be ensured in light of the identified admissions lottery date from Response 5.

What to Submit:

- Submit the response to Request 19 as a Microsoft Word® file named: R-19- Transportation.

Scholars at SBCCS V will be offered transportation services as required under §2853 (4) (b) and §3635 of the Education Law. All transportation services will be received through the Office of Pupil Transportation division of the New York City Department of Education. Parents of scholars ineligible for transportation by their school district are responsible for transporting their children and will be notified of such.

For those times where SBCCS V would require transportation services when the surrounding district does not require them, SBCCS V may seek to purchase those services from the New York City Department of Education pursuant to §2853(4)(b) of the Education Law. Were we unable to make such arrangements, we would pursue other Bronx-based third party transportation companies such as Pioneer Transportation to ensure that we will be able to provide transportation services.

SBCCS V will provide special transportation and accommodations that are included in a student's IEP or 504 plan.

R-20- Insurance

Describe the insurance coverage the charter school education corporation will carry for the school including the name of the insured and amounts of insurance for liability, property loss, personal injury, and any school-owned or leased vehicles or other property. Please include the costs for annual premiums in the proposal budget(s).

What to Submit:

- Submit the response to Request 20 as a Microsoft Word® file named: R-20- Insurance.

CCS has partnered with Austin & Co. to provide the various insurance policies that our schools need each year. Before the start of each year, CCS with the assistance of CSBM, our auditors, and Austin and Company reviews the current policy coverages and makes the decision for any increases. Before the policies are renewed, the Board of Trustee review and approve the proposed policies. When SBCCS V is

chartered, this school location will be added to CCS's policy and have access to the following insurance coverage:

Coverage Type	Coverage
Property Insurance	$1,700,000
Business Income	2,250,000
Crime	300,000
Automobile	1,000,000
Excess Crime	1,500,000
Directors & Officers	1,000,000
General Lability	1,000,000
Umbrella Liability	30,000,000
Excess Educators Liability	30,000,000
Excess Fiduciary Liability	3,000,000
Student Accident	50,000
Catastrophic Accident	1,000,000
Workman's Compensation	Unlimited

The cost of insurance is budgeted in our proposed budget and is based on the historical insurance cost that SBCCS III occurred while operating in private space. Since CCS has a network policy, SBCCS V's portion of the insurance is based on the size of their student population. This combined network coverage helps provide higher coverage and lower cost to the school.

R- 21ad – Fiscal Soundness

a. Budget Narrative

Discuss in narrative form how the startup budget plan, the first-year operational budget and cash flow, and the five-year budget plans are fiscally sound and that sufficient startup funds would be available to the proposed school. Provide the rationale for, or source of, the assumptions upon which the budgets rest, noting specifically which expenses rely on funding from soft money and when the funding for these expenses will transfer to recurring revenue streams, and explain how the budgets support the implementation of the academic program described in the proposal.
Due to ongoing uncertainty of economic conditions and enrollment pattern shifts, the Institute encourages applicants to consider multiple revenue sources, prepare for revenue receipt timing issues, and incorporate backstop strategies. Discussion of these and any other safeguards should be included in this response.

NOTE: Schools that include at-risk designations, "preferences," or set-asides in their admissions policies (with the exception of one extra weight in the lottery) may not be eligible for federal CSP grant funding. Additional information on funding opportunities is available on NYSED's website. IMPORTANT: Timing delays of start-up funds can cause significant obstacles for new charters. Recent CSP grant awards have experienced significant delays in the flow of payments to approved charter recipients. As a precaution, SUNY advises new charter applicants to take steps that include proactive planning of financial backstop measures to ensure financial stability.

SBCCS V's Founding Board has over 50 years of experience in corporate and real estate finance. We have created a conservative financial plan, featuring a comprehensive cash flow and accounting model, to analyze its financial health from the planning year through the fifth year of operation.

The model shows that SBCCS V could operate successfully and deliver its core academic program with no external fundraising. Federal, State, and City per pupil funding and entitlement grants will provide sufficient funding to achieve the school's mission. During years one to three, we anticipate receipt of a $250,000 CSP grant in each year. To be conservative, our budget assumes receipt of no additional resources through foundations; however, there will be a Development Subcommittee on the Board responsible for launching our fundraising efforts. Our budgetary strength will be bolstered by Board contributions/fundraising, a potential capital campaign, and competitive grant applications. Each Board member is expected individually to raise at least $10,000 annually. The Board contributions will ensure that SBCCS V's budgetary needs are satisfied if it does not receive, or experiences delays in receiving, expected Federal or State grants. Our development plan is informed by the Board's high level of experience in fundraising and building strong financial and "in-kind" relationships with businesses, foundations, individuals, and Federal/State grantors.

b. Financial Planning

Explain the process the school will use to develop its annual budget including:

- Who will be involved;
- How needs will be identified and weighed;
- The timeline for creating and approving budgets; and,
- Procedures for monitoring and modifying budgets and on what interval.

Consistent with its explicit goal of demonstrating fiduciary responsibility in managing public and private resources, SBCCS V has set forth detailed policies and procedures to administer the daily fiscal and accounting functions of the school. While the Board of Trustees will provide fiscal oversight, during the first two years of operation the Executive Director (ED) and Director of Business (DB) will oversee all internal functions relating to the accounting, bookkeeping, and general financial and regulatory obligations of the school. SBCCS V will hire a certified public accounting firm to audit our financial information, in conjunction with the other Classical schools, to verify that our records are maintained in accordance with generally accepted accounting principles (GAAP). The ED and DB will develop monthly and annual budgets, to be approved by the Board of Trustees. All assumptions shall be set forth in the budgets.

Payroll and Purchases

The Executive Director and/or Business Manager will keep a file of salaries for each employee. Personnel will be paid bi-weekly by check or by direct deposit. All personnel will "sign in" every morning with a full signature. These attendance sheets will be forwarded to the Executive Director and/or Business Manager for each pay period for verification and approval. The Executive Director will be responsible for all payroll distributions. For purchases less than $10000, the Executive Director will be free to purchase goods from vendors based on price, quality, dependability, and deliver timing. For purchases greater than $50,000, the Executive Director must secure at least three (3) quotes from vendors offering reasonably similar products. All contractual agreements shall be in writing, and signed and dated by the ED and/or the DB.

SBCCS V will maintain the following insurance: (a) Commercial Package (including property and liability); (b) Directors and Officers Liability; (c) Disability; (d) Workers Compensation, and (e) New York State Unemployment Insurance, and any other required insurance policies.

c. Fiscal Audits

Describe the school's plans for at least annual independent fiscal audits conducted by a certified public accountant or certified public accounting firm licensed in New York State. Please note that specific assurances as to fiscal audits are included in the attached Assurances Regarding the Provision of Fiscal Audits and Dissolution.

Accounting, Auditing, and Account Management

SBCCS V will use the accrual basis accounting in accordance with GAAP for its books (including Budget Reports, the Chart of Accounts, and the General Ledger), all financial statements, and any reporting to the IRS or other governmental entities. All completed draft financial reports will be reviewed by the ED and the Board of Trustees on at least a monthly basis. The ED must sign off on the opening or closing of all bank accounts. The DB will reconcile all accounts and shall be completed within thirty (30) days of receipt of bank statements. All borrowings of any size must be approved by the Board of Trustees. All incoming mail will be opened and distributed by the Operations Manager or the School Director. All checks received will be endorsed and recorded by the School Director within one day. All checks and monies received shall be deposited within two business days.

d. Dissolution Procedures

Provide a brief narrative of the procedures that the school would follow, in addition to the SUNY Closure Plan, in the event of closure and dissolution. Applicants should refer to and incorporate elements of the Institute's Closure Plan, in developing this response.

Please note that specific assurances as to dissolution are included in Appendix B: Assurances Regarding the Provision of Fiscal Audits and Dissolution.

- Public Meetings

As school closure is a highly disruptive event for the parents, scholars, staff and local community, the decision to close would be taken with extreme care. SBCCS V commits to providing a smooth exit for the benefit of its scholars, parents, staff, and local community. Prior to any decision, and in accordance with the New York Open Meetings Law, the Board of Trustees will post notification of its meetings to the community, and any known issues or concerns will be addressed at those points.

As required by §2851 (2) (t) of the New York Charter Schools Act and Education Law §§ 219 and 220, SBCCS V has set forth procedures in the event that SBCCS V dissolves or chooses to close. Within five days of the decision to close, a Trustee will be appointed by the board to manage the dissolution of the school, and will distribute an official public notice explaining the dissolution, and its impact on all parties. By the 10th business day after the date of dissolution, the Trustee will coordinate public Board Meetings to provide all parties, especially parents, with an official statement and a timeline of the planned steps leading to a seamless dissolution, as well as updates on the transition.

- Transfer Student Records

The Trustee will provide the district with files of all scholars currently enrolled at SBCCS V. Copies of such files will be given to parents or guardians at the school's expense.

- Scholar Transfer Logistics

The Trustee will also work with the home District to transfer all current scholars to local schools as per typical regulations. SBCCS V will work with the district to ensure that all students are transferred to the applicable public or non-public school.

- Transfer School's Assets

Consistent with the timeline, the Trustee will begin locating possible buyers or renters of SBCCS V non-financial assets, including fixed assets. All remaining assets will be liquidated and all debt obligations will be fully repaid, as much as possible. After satisfaction of outstanding debts and pursuant to Education §220, all remaining assets shall be transferred to another charter school within the NYC district or directly to the NYC school district. Lastly, the school will create an escrow account with a minimum balance of $75,000 to cover dissolution expenses.

R-21e – Budget Template

e. Budget Template

Complete the 2024 RFP Budget Template which can be downloaded from our resource page.

Newly formed applicant groups should submit one budget for each proposed school. Applicant groups that currently operate one or more SUNY authorized charter school(s) and are applying for authority to operate additional SUNY authorized charter schools must submit two five year budget templates, one for the new proposed school, and one for the overall education corporation should the new school(s) be approved.

Applicants should submit a budget that reflects the most likely facility cost scenario when the school is to begin operation. If a proposal includes a budget that assumes a district provided facility, and applicants later secure a private facility, the Institute will require a revised budget.

NOTE: The Institute updates the budget template as changes are made to per-pupil aid funding rates. Please ensure that the application submitted includes the most current template and contact the Institute with any questions or concerns.

NOTE: As a financial safeguard, the Institute requires any CSP grant award funds be conservatively budgeted at a maximum of $500,000.

School Information:

2023 New School Proposal
Budget(s) & Cash Flow(s) Template

South Bronx Classical Charter School V

Contact Name:	Francesca Emanuele
Contact Title:	Special Projects Manager
Contact Email:	[redacted]
Contact Phone:	[redacted]
First Academic Year:	2024-25
Pre-Opening Period:	July 1, 2023 - June 30, 2024

Enrollment Chart:

CHARTER ENROLLMENT BY GRADE							
GRADES	LEVEL	2024-25	2025-26	2026-27	2027-28	2028-29	AGE RANGE
Kindergarten	Elementary School	62	62	62	62	62	4-5
1st Grade	Elementary School	62	62	62	62	62	5-6
2nd Grade	Elementary School		62	62	62	62	6-7
3rd Grade	Elementary School			62	62	62	7-8
4th Grade	Elementary School				62	62	8-9
5th Grade	*Elementary School*					62	9-10
6th Grade	Middle School						
7th Grade	Middle School						
8th Grade	Middle School						
9th Grade	High School						
10th Grade	High School						
11th Grade	High School						
12th Grade	High School						
Ungraded							
TOTAL		124	186	248	310	372	

NUMBER OF CLASSES BY GRADE						
GRADES	LEVEL	2024-25	2025-26	2026-27	2027-28	2028-29
Kindergarten	Elementary School	3	3	3	3	3
1st Grade	Elementary School		3	3	3	3
2nd Grade	Elementary School			3	3	3
3rd Grade	Elementary School				3	3
4th Grade	Elementary School					3
5th Grade	Elementary School					
6th Grade	Middle School					
7th Grade	Middle School					
8th Grade	Middle School					
9th Grade	High School					
10th Grade	High School					
11th Grade	High School					
12th Grade	High School					
Ungraded						
TOTAL		3	6	9	12	15

AVERAGE NUMBER OF STUDENTS PER CLASS BY GRADE						
GRADES	LEVEL	2024-25	2025-26	2026-27	2027-28	2028-29
Kindergarten	Elementary School	21	21	21	21	21
1st Grade	Elementary School	0	21	21	21	21
2nd Grade	Elementary School	0	0	21	21	21
3rd Grade	Elementary School	0	0	0	21	21
4th Grade	Elementary School	0	0	0	0	21
5th Grade	Elementary School	0	0	0	0	0
6th Grade	Middle School	0	0	0	0	0
7th Grade	Middle School	0	0	0	0	0
8th Grade	Middle School	0	0	0	0	0
9th Grade	High School	0	0	0	0	0
10th Grade	High School	0	0	0	0	0
11th Grade	High School	0	0	0	0	0
12th Grade	High School	0	0	0	0	0
Ungraded		0	0	0	0	0

SUMMARY AND OTHER INFORMATION					
Total Elementary Enrollment	124	186	248	310	372
Total Middle School Enrollment	-	-	-	-	-
Total High School Enrollment	-	-	-	-	-
Total Ungraded Enrollment	-	-	-	-	-
Total Enrollment	**124**	**186**	**248**	**310**	**372**
Change in Net Enrollment from Prior Year (Count)	124	62	62	62	62
Change in Net Enrollment from Prior Year (Percent)	100.0%	50.0%	33.3%	25.0%	20.0%
Anticipated rate of attrition (Percent)	10.0%	10.0%	10.0%	10.0%	10.0%

ADDITIONAL NOTES/COMMENTS

ESTIMATED ENROLLMENT BY DISTRICT					
ANNUAL ENROLLMENT BY DISTRICT TOTALS	124	186	248	310	372
Enrollment by Grade vs Enrollment by District (should = 0)	-	-	-	-	-

ENTER NUMBER OF SCHOOL DISTRICTS ANTICIPATED: -->	**1**

PRIMARY SENDING SCHOOL DISTRICT	New York City Department of Education	**2024-25**	**2025-26**	**2026-27**	**2027-28**	**2028-29**
DISTRICT'S ANNUAL TOTAL OPERATING BUDGET		$ 37,500,000,000	$ 37,500,000,000	$ 37,500,000,000	$ 37,500,000,000	$ 37,500,000,000
ENROLLMENT (*Charter School*)		124	186	248	310	372
DESCRIPTION OF SOURCE FOR DISTRICT'S OPERATING BUDGET (Include web address if available)						

SECONDARY SENDING SCHOOL DISTRICT	*Select from drop-down list →*	**2024-25**	**2025-26**	**2026-27**	**2027-28**	**2028-29**
DISTRICT'S ANNUAL TOTAL OPERATING BUDGET		$ -	$ -	$ -	$ -	$ -
ENROLLMENT (*Charter School*)						
DESCRIPTION OF SOURCE FOR DISTRICT'S OPERATING BUDGET (Include web address if available)						

Staffing Plan:

SOUTH BRONX CLASSICAL CHARTER SCHOOL V

STAFFING PLAN FTE		**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124	186	248	310	372

***NOTE:** Enter the number of planned full-time equivalent ("FTE") positions in each category for each charter year in the section provided below.*

***NOTE:** State the assumptions that are being made for personnel FTE levels in the section provided below.*

ADMINISTRATIVE PERSONNEL FTE	**FTE**					**Description of Assumptions**
Executive Management	1.0	1.0	1.0	1.0	1.0	
Instructional Management	1.0	1.0	1.0	2.0	2.0	
Deans, Directors & Coordinators	1.0	1.0	1.0	1.0	2.0	
CFO / Director of Finance	1.0	1.0	1.0	1.0	1.0	
Operation / Business Manager	1.0	1.0	1.0	1.0	1.0	
Administrative Staff	1.0	1.0	2.0	2.0	2.0	
TOTAL ADMINISTRATIVE STAFF	6.0	6.0	7.0	8.0	9.0	

INSTRUCTIONAL PERSONNEL FTE						
Teachers - Regular	11.0	14.0	17.0	21.0	25.0	
Teachers - SPED	3.0	3.0	4.0	5.0	6.0	
Substitute Teachers	0.0	0.0	0.0	0.0	0.0	
Teaching Assistants	3.0	3.0	3.0	3.0	3.0	
Specialty Teachers	3.0	3.0	3.0	3.0	3.0	
Aides	0.0	0.0	0.0	0.0	0.0	
Therapists & Counselors	1.0	1.0	1.0	1.0	1.0	
Other	0.0	0.0	0.0	0.0	0.0	
TOTAL INSTRUCTIONAL	21.0	24.0	28.0	33.0	38.0	

NON-INSTRUCTIONAL PERSONNEL FTE

Nurse	0.0	0.0	0.0	0.0	0.0
Librarian	0.0	0.0	0.0	0.0	0.0
Custodian	0.0	0.0	0.0	0.0	0.0
Security	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0
TOTAL NON-INSTRUCTIONAL	0.0	0.0	0.0	0.0	0.0

TOTAL PERSONNEL SERVICE FTE	27.0	30.0	35.0	41.0	47.0

STAFFING PLAN FTE		**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124	186	248	310	372

TOTAL PERSONNEL SERVICE FTE	27.0	30.0	35.0	41.0	47.0

STAFFING PLAN WAGES		**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124.00	186.00	248.00	310.00	372.00

STAFFING PLAN FTE		**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124	186	248	310	372

***NOTE:** Enter the proposed average salary for each category and the anticipated yearly increase percentages in the section provided below.*

***NOTE:** Concisely state the assumptions that are being made for personnel wages in the section provided below.*

		WAGES					**Description of Assumptions**
ADMINISTRATIVE PERSONNEL WAGES	**Salary/Incr %**	4.00%	4.00%	4.00%	4.00%	4.00%	
Executive Management	$ 150,000	$ 150,000	$ 156,000	$ 162,240	$ 168,730	$ 175,479	
Instructional Management	$ 110,000	$ 110,000	$ 114,400	$ 118,976	$ 233,735	$ 243,084	
Deans, Directors & Coordinators	$ 110,000	$ 110,000	$ 114,400	$ 118,976	$ 123,735	$ 238,684	
CFO / Director of Finance	$ 92,000	$ 92,000	$ 95,680	$ 99,507	$ 103,487	$ 107,627	
Operation / Business Manager	$ 84,000	$ 84,000	$ 87,360	$ 90,854	$ 94,489	$ 98,268	
Administrative Staff	$ 60,000	$ 60,000	$ 62,400	$ 124,896	$ 129,892	$ 135,088	
TOTAL ADMINISTRATIVE STAFF		$ 606,000	$ 630,240	$ 715,450	$ 854,068	$ 998,230	

STAFFING PLAN FTE		**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124	186	248	310	372

INSTRUCTIONAL PERSONNEL WAGES

Teachers - Regular	$ 65,000	$ 715,000	$ 938,600	$ 1,171,144	$ 1,477,990	$ 1,797,109
Teachers - SPED	$ 65,000	$ 195,000	$ 202,800	$ 275,912	$ 351,948	$ 431,026
Substitute Teachers	$ -	$ -	$ -	$ -	$ -	$ -
Teaching Assistants	$ 55,000	$ 165,000	$ 171,600	$ 178,464	$ 185,603	$ 193,027
Specialty Teachers	$ 65,000	$ 195,000	$ 202,800	$ 210,912	$ 219,348	$ 228,122
Aides	$ -	$ -	$ -	$ -	$ -	$ -
Therapists & Counselors	$ 70,000	$ 70,000	$ 72,800	$ 75,712	$ 78,740	$ 81,890
Other	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL INSTRUCTIONAL		$ 1,340,000	$ 1,588,600	$ 1,912,144	$ 2,313,630	$ 2,731,175

STAFFING PLAN FTE		Year 1	Year 2	Year 3	Year 4	Year 5
	Acad Years	2024-25	2025-26	2026-27	2027-28	2028-29
	Grades	K-1	K-2	K-3	K-4	K-5
	Enrollment	124	186	248	310	372

NON-INSTRUCTIONAL PERSONNEL WAGES							
Nurse	$ -	$ -	$ -	$ -	$ -	$ -	
Librarian	$ -	$ -	$ -	$ -	$ -	$ -	
Custodian	$ -	$ -	$ -	$ -	$ -	$ -	
Security	$ -	$ -	$ -	$ -	$ -	$ -	
Other	$ -	$ -	$ -	$ -	$ -	$ -	
TOTAL NON-INSTRUCTIONAL		$ -	$ -	$ -	$ -	$ -	
TOTAL PERSONNEL SERVICE WAGES		$ 1,946,000	$ 2,218,840	$ 2,627,594	$ 3,167,697	$ 3,729,405	

Pre-Opening Period Budget:

SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR PRE-OPENING PERIOD July 1, 2023 - June 30, 2024		
		DESCRIPTION OF ASSUMPTIONS
Total Revenue	**400,000**	
Total Expenses	**399,100**	
Net Income	**900**	
	START-UP PERIOD	
REVENUE		
REVENUES FROM STATE SOURCES		
Grants		
Stimulus	-	none assumed
DYCD (Department of Youth and Community Developmt.)	-	none assumed
Other	-	
Other	-	
TOTAL REVENUE FROM STATE SOURCES	-	
REVENUE FROM FEDERAL FUNDING		
Grants		
Charter School Program (CSP) Planning & Implementation	250,000	CSP Grant first payment
Other	-	
Other	-	
TOTAL REVENUE FROM FEDERAL SOURCES	**250,000**	
LOCAL and OTHER REVENUE		
Contributions and Donations	150,000	none assumed
Fundraising	-	none assumed
Erate Reimbursement	-	none assumed
Earnings on Investments	-	none assumed
Interest Income	-	none assumed
Food Service (Income from meals)	-	none assumed
Text Book	-	none assumed
OTHER	-	none assumed
TOTAL REVENUE FROM LOCAL and OTHER SOURCES	**150,000**	none assumed
TOTAL REVENUE	**400,000**	

EXPENSES			
	FTE No. of Positions		
ADMINISTRATIVE STAFF PERSONNEL COSTS			
Executive Management	1.00	125,000	One school director
Instructional Management	0.50	55,000	0.5 FYE coach
Deans, Directors & Coordinators	0.50	55,000	0.5 FYE dean
CFO / Director of Finance	-	-	
Operation / Business Manager	0.50	55,000	0.5 FYE Operations Manager
Administrative Staff	-	-	
TOTAL ADMINISTRATIVE STAFF	**2.50**	290,000	
INSTRUCTIONAL PERSONNEL COSTS			
Teachers - Regular	-	-	
Teachers - SPED	-	-	
Substitute Teachers	-	-	
Teaching Assistants	-	-	
Specialty Teachers	-	-	
Aides	-	-	
Therapists & Counselors	-	-	
Other	-	-	
TOTAL INSTRUCTIONAL	**-**	**-**	
NON-INSTRUCTIONAL PERSONNEL COSTS			
Nurse	-	-	
Librarian	-	-	
Custodian	-	-	
Security	-	-	
Other	-	-	
TOTAL NON-INSTRUCTIONAL	-	**-**	
SUBTOTAL PERSONNEL SERVICE COSTS	**2.50**	**290,000**	
PAYROLL TAXES AND BENEFITS			
Payroll Taxes		29,000	based on existing payroll costs
Fringe / Employee Benefits		-	
Retirement / Pension		11,600	based on existing benefits administration costs
TOTAL PAYROLL TAXES AND BENEFITS		**40,600**	
TOTAL PERSONNEL SERVICE COSTS	**2.50**	**330,600**	
SCHOOL OPERATIONS			
Board Expenses		-	
Classroom / Teaching Supplies & Materials		-	
Special Ed Supplies & Materials		-	
Textbooks / Workbooks		-	
Supplies & Materials other		10,000	posters, ads, desks, etc. for set up
Equipment / Furniture		3,000	posters, ads, desks, etc. for set up
Telephone		1,500	installation
Technology		5,000	installation
Student Testing & Assessment		-	
Field Trips		-	
Transportation (student)		-	
Student Services - other		-	
Office Expense		3,500	setting up space for launching school
Staff Development		-	
Staff Recruitment		3,000	costs for ads, etc.
Student Recruitment / Marketing		2,500	costs for ads, etc.
School Meals / Lunch		-	
Travel (Staff)		-	
Fundraising		-	
Other		-	
TOTAL SCHOOL OPERATIONS		**28,500**	

FACILITY OPERATION & MAINTENANCE		
Insurance	-	
Janitorial	-	
Building and Land Rent / Lease / Facility Finance Interest	-	
Repairs & Maintenance	-	
Equipment / Furniture	-	
Security	-	
Utilities	-	
TOTAL FACILITY OPERATION & MAINTENANCE	-	
DEPRECIATION & AMORTIZATION	-	
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	-	
TOTAL EXPENSES	399,100	
NET INCOME	900	

Pre-Opening Cash Flow – 1 Year:

PRE-OPENING CASH FLOW 1-YEAR	SOUTH BRONX CLASSICAL CHARTER SCHOOL V												
NOTE: Please enter "Description of Assumptions" on tab "4) Pre-Opening Period Budget."	PROJECTED CASH FLOW FOR SCHOOLS PROPOSING TO OPEN IN THE SECOND YEAR FOLLOWING PROPOSAL SUBMISSION July 1, 2023 - June 30, 2024												
Total Revenue	400,000	-	-	-	-	-	-	-	-	-	-	-	400,000
Total Expenses	96,050	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	399,100
Net Income	303,950	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	(27,550)	900
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance	-	303,950	276,400	248,850	221,300	193,750	166,200	138,650	111,100	83,550	56,000	28,450	-
Net Income	303,950	276,400	248,850	221,300	193,750	166,200	138,650	111,100	83,550	56,000	28,450	900	900
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
REVENUE													
REVENUES FROM STATE SOURCES													
Grants													
Stimulus	-	-	-	-	-	-	-	-	-	-	-	-	-
DYCD (Department of Youth and Community Development)	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM STATE SOURCES	-	-	-	-	-	-	-	-	-	-	-	-	-
REVENUE FROM FEDERAL FUNDING													
Grants													
Charter School Program (CSP) Planning & Implementation	250,000	-	-	-	-	-	-	-	-	-	-	-	250,000
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM FEDERAL SOURCES	250,000	-	-	-	-	-	-	-	-	-	-	-	250,000
LOCAL and OTHER REVENUE													
Contributions and Donations	150,000	-	-	-	-	-	-	-	-	-	-	-	150,000
Fundraising	-	-	-	-	-	-	-	-	-	-	-	-	-
Erate Reimbursement	-	-	-	-	-	-	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-	-	-	-	-	-	-
Interest Income	-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service (Income from meals)	-	-	-	-	-	-	-	-	-	-	-	-	-
Text Book	-	-	-	-	-	-	-	-	-	-	-	-	-
OTHER	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM LOCAL and OTHER SOURCES	150,000	-	-	-	-	-	-	-	-	-	-	-	150,000
TOTAL REVENUE	400,000	-	-	-	-	-	-	-	-	-	-	-	400,000

PRE-OPENING CASH FLOW 1-YEAR		SOUTH BRONX CLASSICAL CHARTER SCHOOL V												
*NOTE: Please enter "Description of Assumptions" on tab "4) Pre-Opening Period Budget."		PROJECTED CASH FLOW FOR SCHOOLS PROPOSING TO OPEN IN THE SECOND YEAR FOLLOWING PROPOSAL SUBMISSION July 1, 2023 - June 30, 2024												
Total Revenue		**400,000**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**400,000**
Total Expenses		**96,050**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**399,100**
Net Income		**303,950**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**900**
Cash Flow Adjustments		-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance		-	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	-
Net Income		**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	**900**	**900**
		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
EXPENSES														
ADMINISTRATIVE PERSONNEL COSTS	FTE No. of Positions													
Executive Management	1.00	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	125,000
Instructional Management	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
Deans, Directors & Coordinators	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
CFO / Director of Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Operation / Business Manager	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
Administrative Staff	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL ADMINISTRATIVE STAFF	2.50	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	290,000
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teachers - SPED	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teaching Assistants	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Specialty Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Aides	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Therapists & Counselors	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL INSTRUCTIONAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Librarian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUBTOTAL PERSONNEL SERVICE COSTS	2.50	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	290,000
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	29,000
Fringe / Employee Benefits		-	-	-	-	-	-	-	-	-	-	-	-	-
Retirement / Pension		967	967	967	967	967	967	967	967	967	967	967	967	11,600
TOTAL PAYROLL TAXES AND BENEFITS		3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	40,600
TOTAL PERSONNEL SERVICE COSTS	2.50	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	330,600
CONTRACTED SERVICES														
Accounting / Audit		20,000	-	-	-		-	-	-	-	-	-	-	20,000
Legal		20,000	-	-	-		-	-	-	-	-	-	-	20,000
Management Company Fee		-	-	-	-	-	-	-	-	-	-	-	-	-
Nurse Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service / School Lunch		-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Special Ed Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Titlement Services (i.e. Title I)		-	-	-	-	-	-	-	-	-	-	-	-	-
Other Purchased / Professional / Consulting		-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL CONTRACTED SERVICES		40,000	-	-	-	-	-	-	-	-	-	-	-	40,000

PRE-OPENING CASH FLOW 1-YEAR		SOUTH BRONX CLASSICAL CHARTER SCHOOL V												
*NOTE: Please enter "Description of Assumptions" on tab "4) Pre-Opening Period Budget."		PROJECTED CASH FLOW FOR SCHOOLS PROPOSING TO OPEN IN THE SECOND YEAR FOLLOWING PROPOSAL SUBMISSION July 1, 2023 - June 30, 2024												
Total Revenue		**400,000**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**400,000**
Total Expenses		**96,050**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**399,100**
Net Income		**303,950**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**900**
Cash Flow Adjustments		-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance		-	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	-
Net Income		**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	**900**	**900**
		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
EXPENSES														
ADMINISTRATIVE PERSONNEL COSTS	FTE No. of Positions													
Executive Management	1.00	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	10,417	125,000
Instructional Management	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
Deans, Directors & Coordinators	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
CFO / Director of Finance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Operation / Business Manager	0.50	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	4,583	55,000
Administrative Staff	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL ADMINISTRATIVE STAFF	2.50	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	290,000
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teachers - SPED	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teaching Assistants	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Specialty Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Aides	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Therapists & Counselors	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL INSTRUCTIONAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Librarian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUBTOTAL PERSONNEL SERVICE COSTS	2.50	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	24,167	290,000
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	2,417	29,000
Fringe / Employee Benefits		-	-	-	-	-	-	-	-	-	-	-	-	-
Retirement / Pension		967	967	967	967	967	967	967	967	967	967	967	967	11,600
TOTAL PAYROLL TAXES AND BENEFITS		3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	3,383	40,600
TOTAL PERSONNEL SERVICE COSTS	2.50	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	27,550	330,600
CONTRACTED SERVICES														
Accounting / Audit		20,000	-	-	-		-	-	-	-	-	-	-	20,000
Legal		20,000	-	-	-		-	-	-	-	-	-	-	20,000
Management Company Fee		-	-	-	-	-	-	-	-	-	-	-	-	-
Nurse Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service / School Lunch		-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Special Ed Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Titlement Services (i.e. Title I)		-	-	-	-	-	-	-	-	-	-	-	-	-
Other Purchased / Professional / Consulting		-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL CONTRACTED SERVICES		40,000	-	-	-	-	-	-	-	-	-	-	-	40,000

PRE-OPENING CASH FLOW 1-YEAR	SOUTH BRONX CLASSICAL CHARTER SCHOOL V												
*NOTE: Please enter "Description of Assumptions" on tab "4) Pre-Opening Period Budget."	PROJECTED CASH FLOW FOR SCHOOLS PROPOSING TO OPEN IN THE SECOND YEAR FOLLOWING PROPOSAL SUBMISSION July 1, 2023 - June 30, 2024												
Total Revenue	**400,000**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**400,000**
Total Expenses	**96,050**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**27,550**	**399,100**
Net Income	**303,950**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**900**
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance	-	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	-
Net Income	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	**900**	**900**
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
CASH FLOW ADJUSTMENTS													
OPERATING ACTIVITIES													
Description (e.g. Add Back Depreciation)	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Operating Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
INVESTMENT ACTIVITIES													
Description (e.g. Subtract Property and Equipment Expenditures)	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Investment Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
FINANCING ACTIVITIES													
Description (e.g. Add Expected Proceeds from a Loan)	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Financing Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
NET INCOME	**303,950**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**(27,550)**	**900**	
Beginning Cash Balance	-	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	-
ENDING CASH BALANCE	**303,950**	**276,400**	**248,850**	**221,300**	**193,750**	**166,200**	**138,650**	**111,100**	**83,550**	**56,000**	**28,450**	**900**	**900**

Year 1 Budget and Assumption:

YEAR 1 BUDGET AND ASSUMPTION			SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE JULY 1, 2024 - JUNE 30, 2025						DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made for the 1-Year Budget in the section provided below.*
Total Revenue			2,319,643	-	-	-	-	2,319,643	
Total Expenses			170,855	20,784	-	-	508,464	700,103	
Net Income			2,148,788	(20,784)	-	-	(508,464)	1,619,540	
Budgeted Student Enrollment			124	-				124	
			PROGRAM SERVICES			SUPPORT SERVICES			
			REGULAR EDUCATION	SPECIAL EDUCATION	OTHER	FUNDRAISING	MANAGEMENT & GENERAL	TOTAL	
REVENUE									
REVENUES FROM STATE SOURCES									
Per Pupil Revenue		Basic Tuition (2023-24)							
PRIMARY School District:	New York City Department of Education	18,340	2,319,643					2,319,643	
Other District 1:		-	-					-	
Other District 2:		-	-					-	
Other District 3:		-	-					-	
Other District 4:		-	-					-	
Other District 5:		-	-					-	
Other District 6:		-	-					-	
Other District 7:		-	-					-	
Other District 8:		-	-					-	
Other District 9:		-	-					-	
Other District 10:		-	-					-	
Other District 11:		-	-					-	
Other District 12:		-	-					-	
Other District 13:		-	-					-	
Other District 14:		-	-					-	
Other School Districts' Revenue:	(Weighted Avg.)	-	-					-	
TOTAL Per Pupil Revenue	(Weighted Avg.)	18,340	2,319,643					2,319,643	
Special Education Revenue				-				-	
NYC DoE Rental Assistance			-	-	-	-	-	-	
Grants									
Stimulus			-	-	-	-	-	-	
DYCD (Department of Youth and Community Development)			-	-	-	-	-	-	
Other			-	-	-	-	-	-	
Other			-	-	-	-	-	-	
TOTAL REVENUE FROM STATE SOURCES			2,319,643	-	-	-	-	2,319,643	
REVENUE FROM FEDERAL FUNDING									
IDEA Special Needs			-	-	-			-	
Title I			-	-	-			-	
Title Funding - Other			-	-	-			-	
School Food Service (Free Lunch)			-	-	-			-	
Grants									
Charter School Program (CSP) Planning & Implementation			-	-	-	-	-	-	
Other			-	-	-	-	-	-	
Other			-	-	-	-	-	-	
TOTAL REVENUE FROM FEDERAL SOURCES			-	-	-	-	-	-	
LOCAL and OTHER REVENUE									
Contributions and Donations			-	-	-	-	-	-	
Fundraising			-	-	-	-	-	-	
Erate Reimbursement			-	-	-	-	-	-	
Earnings on Investments			-	-	-	-	-	-	
Interest Income			-	-	-	-	-	-	
Food Service (Income from meals)			-	-	-	-	-	-	
Text Book			-	-	-	-	-	-	
OTHER			-	-	-	-	-	-	
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			-	-	-	-	-	-	
TOTAL REVENUE			2,319,643	-	-	-	-	2,319,643	

YEAR 1 BUDGET AND ASSUMPTION		SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE JULY 1, 2024 - JUNE 30, 2025						DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made for the 1-Year Budget in the section provided below.
Total Revenue		2,319,643	-	-	-	-	2,319,643	
Total Expenses		170,855	20,784	-	-	508,464	700,103	
Net Income		2,148,788	(20,784)	-	-	(508,464)	1,619,540	
Budgeted Student Enrollment		124	-				124	
		PROGRAM SERVICES			SUPPORT SERVICES			
		REGULAR EDUCATION	SPECIAL EDUCATION	OTHER	FUNDRAISING	MANAGEMENT & GENERAL	TOTAL	
EXPENSES								
ADMINISTRATIVE STAFF PERSONNEL COSTS	FTE No. of Positions							
Executive Management	1.00	-	-	-	-	-	-	
Instructional Management	1.00	-	-	-	-	-	-	
Deans, Directors & Coordinators	1.00	-	-	-	-	-	-	
CFO / Director of Finance	1.00	-	-	-	-	-	-	
Operation / Business Manager	1.00	-	-	-	-	-	-	
Administrative Staff	1.00	-	-	-	-	-	-	
TOTAL ADMINISTRATIVE STAFF	6.00	-	-	-	-	-	-	
INSTRUCTIONAL PERSONNEL COSTS								
Teachers - Regular	11.00	-	-	-	-	-	-	
Teachers - SPED	3.00	-	-	-	-	-	-	
Substitute Teachers	-	-	-	-	-	-	-	
Teaching Assistants	3.00	-	-	-	-	-	-	
Specialty Teachers	3.00	-	-	-	-	-	-	
Aides	-	-	-	-	-	-	-	
Therapists & Counselors	1.00	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	
TOTAL INSTRUCTIONAL	21.00	-	-	-	-	-	-	
NON-INSTRUCTIONAL PERSONNEL COSTS								
Nurse	-	-	-	-	-	-	-	
Librarian	-	-	-	-	-	-	-	
Custodian	-	-	-	-	-	-	-	
Security	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-	-	
SUBTOTAL PERSONNEL SERVICE COSTS	27.00	-	-	-	-	-	-	
PAYROLL TAXES AND BENEFITS								
Payroll Taxes		-	-	-	-	-	-	
Fringe / Employee Benefits		-	-	-	-	-	-	
Retirement / Pension		-	-	-	-	-	-	
TOTAL PAYROLL TAXES AND BENEFITS		-	-	-	-	-	-	
TOTAL PERSONNEL SERVICE COSTS	27.00	-	-	-	-	-	-	
CONTRACTED SERVICES								
Accounting / Audit		-	-	-	-	-	-	
Legal		-	-	-	-	-	-	
Management Company Fee		-	-	-	-	-	-	
Nurse Services		-	-	-	-	-	-	
Food Service / School Lunch		-	-	-	-	-	-	
Payroll Services		-	-	-	-	-	-	
Special Ed Services		-	-	-	-	-	-	
Titlement Services (i.e. Title I)		-	-	-	-	-	-	
Other Purchased / Professional / Consulting		-	-	-	-	-	-	
TOTAL CONTRACTED SERVICES		-	-	-	-	-	-	

YEAR 1 BUDGET AND ASSUMPTION	SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE JULY 1, 2024 - JUNE 30, 2025						DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made for the 1-Year Budget in the section provided below.*
Total Revenue	2,319,643	-	-	-	-	2,319,643	
Total Expenses	170,855	20,784	-	-	508,464	700,103	
Net Income	2,148,788	(20,784)	-	-	(508,464)	1,619,540	
Budgeted Student Enrollment	124	-				124	
	PROGRAM SERVICES			SUPPORT SERVICES			
	REGULAR EDUCATION	SPECIAL EDUCATION	OTHER	FUNDRAISING	MANAGEMENT & GENERAL	TOTAL	
SCHOOL OPERATIONS							
Board Expenses	-	-	-	-	-	-	none assumed
Classroom / Teaching Supplies & Materials	18,630	2,070	-	-	-	20,700	90% general ed, 10% special education, actual SBC IV
Special Ed Supplies & Materials		1,800	-	-	-	1,800	all special education expenses
Textbooks / Workbooks	16,200	1,800	-	-	-	18,000	90% general ed, 10% special education, actual SBC IV
Supplies & Materials other	48,600	5,400	-	-	-	54,000	90% general ed, 10% special education, actual SBC IV
Equipment / Furniture	38,880	4,320	-	-	-	43,200	90% general ed, 10% special education, actual SBC IV
Telephone	972	108	-	-	-	1,080	90% general ed, 10% special education, actual SBC IV
Technology	16,200	1,800	-	-	-	18,000	90% general ed, 10% special education, actual SBC IV
Student Testing & Assessment	3,240	360	-	-	-	3,600	90% general ed, 10% special education, actual SBC IV
Field Trips	810	90	-	-	-	900	90% general ed, 10% special education, actual SBC IV
Transportation (student)	12,150	1,350	-	-	-	13,500	90% general ed, 10% special education, actual SBC IV
Student Services - other	810	90	-	-	-	900	90% general ed, 10% special education, actual SBC IV
Office Expense			-	-	7,650	7,650	school management expenses, estimated single room
Staff Development	-	-	-	-	-	-	
Staff Recruitment	-	-	-	-	-	-	
Student Recruitment / Marketing	-	-	-	-	-	-	
School Meals / Lunch	14,363	1,596	-	-	-	15,959	90% general ed, 10% special education, actual SBC IV
Travel (Staff)	-	-	-	-	-	-	
Fundraising	-	-	-	-	-	-	
Other	-	-	-	-	-	-	
TOTAL SCHOOL OPERATIONS	170,855	20,784	-	-	7,650	199,289	
FACILITY OPERATION & MAINTENANCE							
Insurance	-	-	-	-	23,445	23,445	based on actual SBC IV opening data
Janitorial	-	-	-	-	15,000	15,000	based on actual SBC IV opening data
Building and Land Rent / Lease / Facility Finance Interest	-	-	-	-	347,870	347,870	based on actual SBC IV opening data
Repairs & Maintenance	-	-	-	-	2,000	2,000	based on actual SBC IV opening data
Equipment / Furniture	-	-	-	-	7,500	7,500	based on actual SBC IV opening data
Security	-	-	-	-	-	-	
Utilities	-	-	-	-	30,000	30,000	based on actual SBC IV opening data
TOTAL FACILITY OPERATION & MAINTENANCE	-	-	-	-	425,814	425,814	
DEPRECIATION & AMORTIZATION	-	-	-	-	-	-	
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	-	-	-	-	75,000	75,000	as required
TOTAL EXPENSES	170,855	20,784	-	-	508,464	700,103	
NET INCOME	2,148,788	(20,784)	-	-	(508,464)	1,619,540	

YEAR 1 BUDGET AND ASSUMPTION	SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE JULY 1, 2024 - JUNE 30, 2025						DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made for the 1-Year Budget in the section provided below.*
Total Revenue	2,319,643	-	-	-	-	2,319,643	
Total Expenses	170,855	20,784	-	-	508,464	700,103	
Net Income	2,148,788	(20,784)	-	-	(508,464)	1,619,540	
Budgeted Student Enrollment	124	-				124	
	PROGRAM SERVICES			SUPPORT SERVICES			
	REGULAR EDUCATION	SPECIAL EDUCATION	OTHER	FUNDRAISING	MANAGEMENT & GENERAL	TOTAL	
ENROLLMENT - *School Districts Are Linked To Above Entries*							
PRIMARY School District: New York City Department of Education	124					124	
Other District 1:	-					-	
Other District 2:	-					-	
Other District 3:	-					-	
Other District 4:	-					-	
Other District 5:	-					-	
Other District 6:	-					-	
Other District 7:	-					-	
Other District 8:	-					-	
Other District 9:	-					-	
Other District 10:	-					-	
Other District 11:	-					-	
Other District 12:	-					-	
Other District 13:	-					-	
Other District 14:	-					-	
All Other School Districts	-					-	
TOTAL ENROLLMENT	124					124	
REVENUE PER PUPIL	18,707					18,707	
EXPENSES PER PUPIL	1,378					5,646	

YEAR 1 BUDGET AND ASSUMPTION			Error Checking (Comparison to Totals Unequal - (See Below)
Total Revenue			Tab 7 is Different by 1,255,730.
Total Expenses			Tab 9 is Different by 73,600.00
Net Income			Tab 9 is Different by 73,600.00
Budgeted Student Enrollment			OK
REVENUE			
REVENUES FROM STATE SOURCES			
Per Pupil Revenue		Basic Tuition (2023-24)	
PRIMARY School District:	New York City Department of Education	18,340	OK
Other District 1:		-	OK
Other District 2:		-	OK
Other District 3:		-	OK
Other District 4:		-	OK
Other District 5:		-	OK
Other District 6:		-	OK
Other District 7:		-	OK
Other District 8:		-	OK
Other District 9:		-	OK
Other District 10:		-	OK
Other District 11:		-	OK
Other District 12:		-	OK
Other District 13:		-	OK
Other District 14:		-	OK
Other School Districts' Revenue:	(Weighted Avg.)	-	OK
TOTAL Per Pupil Revenue	(Weighted Avg.)	18,340	OK
Special Education Revenue			Tab 7 is Different by 231,964.32
NYC DoE Rental Assistance			Tab 7 is Different by 425,820.00
Grants			
Stimulus			OK
DYCD (Department of Youth and Community Development)			OK
Other			OK
Other			OK
TOTAL REVENUE FROM STATE SOURCES			Tab 7 is Different by 657,784.32
REVENUE FROM FEDERAL FUNDING			
IDEA Special Needs			OK
Title I			Tab 7 is Different by 347,946.48
Title Funding - Other			OK
School Food Service (Free Lunch)			OK
Grants			
Charter School Program (CSP) Planning & Implementation			Tab 7 is Different by 250,000.00
Other			OK
Other			OK
TOTAL REVENUE FROM FEDERAL SOURCES			Tab 7 is Different by 597,946.48
LOCAL and OTHER REVENUE			
Contributions and Donations			OK
Fundraising			OK
Erate Reimbursement			OK
Earnings on Investments			OK
Interest Income			OK
Food Service (Income from meals)			OK
Text Book			OK
OTHER			OK
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			OK
TOTAL REVENUE			Tab 7 is Different by 1,255,730.

YEAR 1 BUDGET AND ASSUMPTION

		Error Checking (Comparison to Totals Unequal - (See Below)
Total Revenue		Tab 7 is Different by 1,255,730.
Total Expenses		Tab 9 is Different by 73,600.00
Net Income		Tab 9 is Different by 73,600.00
Budgeted Student Enrollment		OK
EXPENSES		
ADMINISTRATIVE STAFF PERSONNEL COSTS	FTE No. of Positions	
Executive Management	1.00	Tab 7 is Different by 150,000.0(
Instructional Management	1.00	Tab 7 is Different by 110,000.0(
Deans, Directors & Coordinators	1.00	Tab 7 is Different by 110,000.0(
CFO / Director of Finance	1.00	Tab 9 is Different by 73,600.00
Operation / Business Manager	1.00	Tab 7 is Different by 84,000.00
Administrative Staff	1.00	Tab 7 is Different by 60,000.00
TOTAL ADMINISTRATIVE STAFF	6.00	Tab 9 is Different by 73,600.00
INSTRUCTIONAL PERSONNEL COSTS		
Teachers - Regular	11.00	Tab 7 is Different by 715,000.0(
Teachers - SPED	3.00	Tab 7 is Different by 195,000.0(
Substitute Teachers	-	OK
Teaching Assistants	3.00	Tab 7 is Different by 165,000.0(
Specialty Teachers	3.00	Tab 7 is Different by 195,000.0(
Aides	-	OK
Therapists & Counselors	1.00	Tab 7 is Different by 70,000.00
Other	-	OK
TOTAL INSTRUCTIONAL	21.00	Tab 7 is Different by 1,340,000.
NON-INSTRUCTIONAL PERSONNEL COSTS		
Nurse	-	OK
Librarian	-	OK
Custodian	-	OK
Security	-	OK
Other	-	OK
TOTAL NON-INSTRUCTIONAL	-	OK
SUBTOTAL PERSONNEL SERVICE COSTS	27.00	Tab 9 is Different by 73,600.00
PAYROLL TAXES AND BENEFITS		
Payroll Taxes		Tab 7 is Different by 99,237.20
Fringe / Employee Benefits		Tab 7 is Different by 168,516.0(
Retirement / Pension		Tab 7 is Different by 56,172.00
TOTAL PAYROLL TAXES AND BENEFITS		Tab 7 is Different by 323,925.2(
TOTAL PERSONNEL SERVICE COSTS	27.00	Tab 9 is Different by 73,600.00
CONTRACTED SERVICES		OK
Accounting / Audit		Tab 7 is Different by 25,000.00
Legal		OK
Management Company Fee		OK
Nurse Services		Tab 7 is Different by 16,250.00
Food Service / School Lunch		OK
Payroll Services		OK
Special Ed Services		Tab 7 is Different by 10,400.00
Titlement Services (i.e. Title I)		OK
Other Purchased / Professional / Consulting		Tab 7 is Different by 40,000.00
TOTAL CONTRACTED SERVICES		Tab 7 is Different by 91,650.00

YEAR 1 BUDGET AND ASSUMPTION	Error Checking (Comparison to Totals Unequal - (See Below)
Total Revenue	Tab 7 is Different by 1,255,730.
Total Expenses	Tab 9 is Different by 73,600.00
Net Income	Tab 9 is Different by 73,600.00
Budgeted Student Enrollment	OK
SCHOOL OPERATIONS	
Board Expenses	OK
Classroom / Teaching Supplies & Materials	OK
Special Ed Supplies & Materials	OK
Textbooks / Workbooks	OK
Supplies & Materials other	OK
Equipment / Furniture	OK
Telephone	OK
Technology	OK
Student Testing & Assessment	OK
Field Trips	OK
Transportation (student)	OK
Student Services - other	OK
Office Expense	OK
Staff Development	OK
Staff Recruitment	OK
Student Recruitment / Marketing	OK
School Meals / Lunch	OK
Travel (Staff)	OK
Fundraising	OK
Other	OK
TOTAL SCHOOL OPERATIONS	OK
FACILITY OPERATION & MAINTENANCE	
Insurance	OK
Janitorial	OK
Building and Land Rent / Lease / Facility Finance Interest	OK
Repairs & Maintenance	OK
Equipment / Furniture	Tab 7 is Different by 82,500.00
Security	OK
Utilities	OK
TOTAL FACILITY OPERATION & MAINTENANCE	Tab 7 is Different by 82,500.00
DEPRECIATION & AMORTIZATION	OK
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	OK
TOTAL EXPENSES	Tab 9 is Different by 73,600.00
NET INCOME	Tab 9 is Different by 73,600.00

YEAR 1 BUDGET AND ASSUMPTION		Error Checking (Comparison to Totals Unequal - (See Below)
Total Revenue		Tab 7 is Different by 1,255,730.
Total Expenses		Tab 9 is Different by 73,600.00
Net Income		Tab 9 is Different by 73,600.00
Budgeted Student Enrollment		OK
ENROLLMENT - *School Districts Are Linked To Above Entries*		
PRIMARY School District:	New York City Department of Education	OK
Other District 1:		OK
Other District 2:		OK
Other District 3:		OK
Other District 4:		OK
Other District 5:		OK
Other District 6:		OK
Other District 7:		OK
Other District 8:		OK
Other District 9:		OK
Other District 10:		OK
Other District 11:		OK
Other District 12:		OK
Other District 13:		OK
Other District 14:		OK
All Other School Districts		OK
TOTAL ENROLLMENT		OK
REVENUE PER PUPIL		Tab 7 is UNEQUAL to Tab 9
EXPENSES PER PUPIL		Tab 7 is UNEQUAL to Tab 9

Year 1 Cash Flow:

YEAR 1 CASH FLOW (FIRST YEAR OF CHARTER)			SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED CASH FLOW FOR YEAR ONE OF OPERATIONS JULY 1, 2024 - JUNE 30, 2025												
Total Revenue			759,268	92,339	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	3,575,374
Total Expenses			408,644	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	3,070,578
Net Income			350,624	(149,655)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	504,796
Cash Flow Adjustments			-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance			-	350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	-
Ending Cash Balance			350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	504,796	504,796
			JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**TOTAL**
REVENUE			* Totals (Column U) for all lines above Cash Flow Adjustments should equal the Totals (Column N) on tab "7) Year 1 Budget & Assumptions."												
REVENUES FROM STATE SOURCES															
Per Pupil Revenue		Basic Tuition (2023-24)													
PRIMARY School District:	New York City Department of Education	18,340	379,027	45,483	379,027	-	379,027	-	379,027	-	379,027	-	379,027	-	2,319,643
Other District 1:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 2:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 3:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 4:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 5:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 6:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 7:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 8:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 9:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 10:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 11:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 12:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 13:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other District 14:		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other School Districts' Revenue:	(Weighted Avg.)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL Per Pupil Revenue	(Weighted Avg.)	18,340	379,027	45,483	379,027	-	379,027	-	379,027	-	379,027	-	379,027	-	2,319,643
Special Education Revenue			37,903	4,548	37,903	-	37,903	-	37,903	-	37,903	-	37,903	-	231,964
NYC DoE Rental Assistance			35,485	35,485	35,485	35,485	35,485	35,485	35,485	35,485	35,485	35,485	35,485	35,485	425,820
Grants															
Stimulus			-	-	-	-	-	-	-	-	-	-	-	-	-
DYCD (Department of Youth and Community Developmt.)			-	-	-	-	-	-	-	-	-	-	-	-	-
Other			-	-	-	-	-	-	-	-	-	-	-	-	-
Other			-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM STATE SOURCES			452,414	85,517	452,414	35,485	452,414	35,485	452,414	35,485	452,414	35,485	452,414	35,485	2,977,428
REVENUE FROM FEDERAL FUNDING															
IDEA Special Needs			-	-	-	-	-	-	-	-	-	-	-	-	-
Title I			56,854	6,822	56,854	-	56,854	-	56,854	-	56,854	-	56,854	-	347,946
Title Funding - Other			-	-	-	-	-	-	-	-	-	-	-	-	-
School Food Service (Free Lunch)			-	-	-	-	-	-	-	-	-	-	-	-	-
Grants															
Charter School Program (CSP) Planning & Implementation			250,000	-	-	-	-	-	-	-	-	-	-	-	250,000
Other			-	-	-	-	-	-	-	-	-	-	-	-	-
Other			-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM FEDERAL SOURCES			306,854	6,822	56,854	-	56,854	-	56,854	-	56,854	-	56,854	-	597,946
LOCAL and OTHER REVENUE															
Contributions and Donations			-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising			-	-	-	-	-	-	-	-	-	-	-	-	-
Erate Reimbursement			-	-	-	-	-	-	-	-	-	-	-	-	-
Earnings on Investments			-	-	-	-	-	-	-	-	-	-	-	-	-
Interest Income			-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service (Income from meals)			-	-	-	-	-	-	-	-	-	-	-	-	-
Text Book			-	-	-	-	-	-	-	-	-	-	-	-	-
OTHER			-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE			759,268	92,339	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	3,575,374

YEAR 1 CASH FLOW *(FIRST YEAR OF CHARTER)*		SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED CASH FLOW FOR YEAR ONE OF OPERATIONS JULY 1, 2024 - JUNE 30, 2025												
Total Revenue		**759,268**	**92,339**	**509,268**	**35,485**	**509,268**	**35,485**	**509,268**	**35,485**	**509,268**	**35,485**	**509,268**	**35,485**	**3,575,374**
Total Expenses		**408,644**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**241,994**	**3,070,578**
Net Income		**350,624**	**(149,655)**	**267,274**	**(206,509)**	**267,274**	**(206,509)**	**267,274**	**(206,509)**	**267,274**	**(206,509)**	**267,274**	**(206,509)**	**504,796**
Cash Flow Adjustments		-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance		-	**350,624**	**200,969**	**468,244**	**261,735**	**529,009**	**322,500**	**589,774**	**383,265**	**650,539**	**444,030**	**711,305**	-
Ending Cash Balance		**350,624**	**200,969**	**468,244**	**261,735**	**529,009**	**322,500**	**589,774**	**383,265**	**650,539**	**444,030**	**711,305**	**504,796**	**504,796**
		JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**TOTAL**
EXPENSES														
ADMINISTRATIVE STAFF PERSONNEL COSTS	No. of Positions													
Executive Management	1.00	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	150,000
Instructional Management	1.00	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	110,000
Deans, Directors & Coordinators	1.00	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	9,167	110,000
CFO / Director of Finance	1.00	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	1,533	18,400
Operation / Business Manager	1.00	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	84,000
Administrative Staff	1.00	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	60,000
TOTAL ADMINISTRATIVE STAFF	6.00	44,367	44,367	44,367	44,367	44,367	44,367	44,367	44,367	44,367	44,367	44,367	44,367	532,400
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	11.00	59,583	59,583	59,583	59,583	59,583	59,583	59,583	59,583	59,583	59,583	59,583	59,583	715,000
Teachers - SPED	3.00	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	195,000
Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teaching Assistants	3.00	13,750	13,750	13,750	13,750	13,750	13,750	13,750	13,750	13,750	13,750	13,750	13,750	165,000
Specialty Teachers	3.00	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	16,250	195,000
Aides	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Therapists & Counselors	1.00	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	70,000
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL INSTRUCTIONAL	21.00	111,667	111,667	111,667	111,667	111,667	111,667	111,667	111,667	111,667	111,667	111,667	111,667	1,340,000
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Librarian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUBTOTAL PERSONNEL SERVICE COSTS	27.00	156,033	156,033	156,033	156,033	156,033	156,033	156,033	156,033	156,033	156,033	156,033	156,033	1,872,400
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		8,270	8,270	8,270	8,270	8,270	8,270	8,270	8,270	8,270	8,270	8,270	8,270	99,237
Fringe / Employee Benefits		14,043	14,043	14,043	14,043	14,043	14,043	14,043	14,043	14,043	14,043	14,043	14,043	168,516
Retirement / Pension		4,681	4,681	4,681	4,681	4,681	4,681	4,681	4,681	4,681	4,681	4,681	4,681	56,172
TOTAL PAYROLL TAXES AND BENEFITS		26,994	26,994	26,994	26,994	26,994	26,994	26,994	26,994	26,994	26,994	26,994	26,994	323,925
TOTAL PERSONNEL SERVICE COSTS	27.00	183,027	183,027	183,027	183,027	183,027	183,027	183,027	183,027	183,027	183,027	183,027	183,027	2,196,325
CONTRACTED SERVICES														
Accounting / Audit		25,000	-	-	-	-	-	-	-	-	-	-	-	25,000
Legal		-	-	-	-	-	-	-	-	-	-	-	-	-
Management Company Fee		-	-	-	-	-	-	-	-	-	-	-	-	-
Nurse Services		16,250	-	-	-	-	-	-	-	-	-	-	-	16,250
Food Service / School Lunch		-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services			-	-	-	-	-	-	-	-	-	-	-	-
Special Ed Services		10,400	-	-	-	-	-	-	-	-	-	-	-	10,400
Titlement Services (i.e. Title I)		-	-	-	-	-	-	-	-	-	-	-	-	-
Other Purchased / Professional / Consulting		40,000	-	-	-	-	-	-	-	-	-	-	-	40,000
TOTAL CONTRACTED SERVICES		91,650	-	-	-	-	-	-	-	-	-	-	-	91,650

YEAR 1 CASH FLOW *(FIRST YEAR OF CHARTER)*	SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED CASH FLOW FOR YEAR ONE OF OPERATIONS JULY 1, 2024 - JUNE 30, 2025												
Total Revenue	759,268	92,339	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	509,268	35,485	3,575,374
Total Expenses	408,644	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	3,070,578
Net Income	350,624	(149,655)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	504,796
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance	-	350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	-
Ending Cash Balance	350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	504,796	504,796
	JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**	**JAN**	**FEB**	**MAR**	**APR**	**MAY**	**JUN**	**TOTAL**
SCHOOL OPERATIONS													
Board Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-
Classroom / Teaching Supplies & Materials	1725	1,725	1,725	1,725	1,725	1,725	1,725	1,725	1,725	1,725	1,725	1,725	20,700
Special Ed Supplies & Materials	150	150	150	150	150	150	150	150	150	150	150	150	1,800
Textbooks / Workbooks	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	18,000
Supplies & Materials other	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	4,500	54,000
Equipment / Furniture	3,600	3,600	3,600	3,600	3,600	3,600	3,600	3,600	3,600	3,600	3,600	3,600	43,200
Telephone	90	90	90	90	90	90	90	90	90	90	90	90	1,080
Technology	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	18,000
Student Testing & Assessment	300	300	300	300	300	300	300	300	300	300	300	300	3,600
Field Trips	75	75	75	75	75	75	75	75	75	75	75	75	900
Transportation (student)	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	13,500
Student Services - other	75	75	75	75	75	75	75	75	75	75	75	75	900
Office Expense	638	638	638	638	638	638	638	638	638	638	638	638	7,650
Staff Development	-	-	-	-	-	-	-	-	-	-	-	-	-
Staff Recruitment	-	-	-	-	-	-	-	-	-	-	-	-	-
Student Recruitment / Marketing	-	-	-	-	-	-	-	-	-	-	-	-	-
School Meals / Lunch	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	15,959
Travel (Staff)	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL SCHOOL OPERATIONS	16,607	16,607	16,607	16,607	16,607	16,607	16,607	16,607	16,607	16,607	16,607	16,607	199,289
FACILITY OPERATION & MAINTENANCE													
Insurance	1,954	1,954	1,954	1,954	1,954	1,954	1,954	1,954	1,954	1,954	1,954	1,954	23,445
Janitorial	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	15,000
Building and Land Rent / Lease / Facility Finance Interest	28,989	28,989	28,989	28,989	28,989	28,989	28,989	28,989	28,989	28,989	28,989	28,989	347,870
Repairs & Maintenance	167	167	167	167	167	167	167	167	167	167	167	167	2,000
Equipment / Furniture	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	90,000
Security	-	-	-	-	-	-	-	-	-	-	-	-	-
Utilities	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	2,500	30,000
TOTAL FACILITY OPERATION & MAINTENANCE	42,360	42,360	42,360	42,360	42,360	42,360	42,360	42,360	42,360	42,360	42,360	42,360	508,314
DEPRECIATION & AMORTIZATION	-	-	-	-	-	-	-	-	-	-	-	-	-
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	75,000	-	-	-	-	-	-	-	-	-	-	-	75,000
TOTAL EXPENSES	408,644	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	241,994	3,070,578
NET INCOME	350,624	(149,655)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	504,796
CASH FLOW ADJUSTMENTS													
OPERATING ACTIVITIES													
Example - Add Back Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Operating Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
INVESTMENT ACTIVITIES													
Example - Subtract Property and Equipment Expenditures	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Investment Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
FINANCING ACTIVITIES													
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Financing Activities	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-
NET INCOME	350,624	(149,655)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	267,274	(206,509)	504,796
Beginning Cash Balance	-	350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	-
ENDING CASH BALANCE	350,624	200,969	468,244	261,735	529,009	322,500	589,774	383,265	650,539	444,030	711,305	504,796	504,796

5 Year Budget and Cash Flow Adjustments:

5 YEAR BUDGET AND CASH FLOW ADJUSTMENTS *NOTE: Projected Five Year Budget on this tab should be for the first five years of actual operations.			SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD 2024-25 THROUGH 2028-29					DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made in the section provided below.
Total Revenue			3,575,374	3,799,054	5,076,714	6,154,060	7,532,569	
Total Expenses			3,144,178	3,598,568	4,982,617	5,687,995	6,432,376	
Net Income (Before Cash Flow Adjustments)			431,196	200,486	94,096	466,065	1,100,193	
Budgeted Student Enrollment			124	186	248	310	372	
			Year 1 2024-25	**Year 2 2025-26**	**Year 3 2026-27**	**Year 4 2027-28**	**Year 5 2028-29**	
REVENUE			**Per Pupil Revenue Percentage Increase**					
REVENUES FROM STATE SOURCES			**2.0%**	**2.0%**	**2.0%**	**2.0%**	**2.0%**	
Per Pupil Revenue		Basic Tuition (2023-24)						
PRIMARY School District:	New York City Department of Education	18,340	2,319,643	3,549,054	4,826,714	6,154,060	7,532,569	
Other District 1:		-	-	-	-	-	-	
Other District 2:		-	-	-	-	-	-	
Other District 3:		-	-	-	-	-	-	
Other District 4:		-	-	-	-	-	-	
Other District 5:		-	-	-	-	-	-	
Other District 6:		-	-	-	-	-	-	
Other District 7:		-	-	-	-	-	-	
Other District 8:		-	-	-	-	-	-	
Other District 9:		-	-	-	-	-	-	
Other District 10:		-	-	-	-	-	-	
Other District 11:		-	-	-	-	-	-	
Other District 12:		-	-	-	-	-	-	
Other District 13:		-	-	-	-	-	-	
Other District 14:		-	-	-	-	-	-	
Other School Districts' Revenue:	(Weighted Avg.)	-	-	-	-	-	-	
TOTAL Per Pupil Revenue	(Weighted Avg.)	18,340	2,319,643	3,549,054	4,826,714	6,154,060	7,532,569	
Special Education Revenue			231,964	-	-	-	-	approximately 10% of general education budget
NYC DoE Rental Assistance			425,820	-	-	-	-	approximately equal to rent and associated costs of space
Grants								
Stimulus			-	250,000	250,000	-	-	CSP grant (total of $750,000)
DYCD (Department of Youth and Community Developmt.)			-	-	-	-	-	
Other			-	-	-	-	-	
Other			-	-	-	-	-	
TOTAL REVENUE FROM STATE SOURCES			2,977,428	3,799,054	5,076,714	6,154,060	7,532,569	
REVENUE FROM FEDERAL FUNDING								
IDEA Special Needs			-	-	-	-	-	
Title I			347,946	-	-	-	-	
Title Funding - Other			-	-	-	-	-	
School Food Service (Free Lunch)			-	-	-	-	-	
Grants								
Charter School Program (CSP) Planning & Implementation			250,000	-	-	-	-	
Other			-	-	-	-	-	
Other			-	-	-	-	-	
TOTAL REVENUE FROM FEDERAL SOURCES			597,946	-	-	-	-	
LOCAL and OTHER REVENUE								
Contributions and Donations			-	-	-	-	-	
Fundraising			-	-	-	-	-	
Erate Reimbursement			-	-	-	-	-	
Earnings on Investments			-	-	-	-	-	
Interest Income			-	-	-	-	-	
Food Service (Income from meals)			-	-	-	-	-	
Text Book			-	-	-	-	-	
OTHER			-	-	-	-	-	
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			-	-	-	-	-	
TOTAL REVENUE			3,575,374	3,799,054	5,076,714	6,154,060	7,532,569	

5 YEAR BUDGET AND CASH FLOW ADJUSTMENTS		SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD 2024-25 THROUGH 2028-29					DESCRIPTION OF ASSUMPTIONS
*NOTE: Projected Five Year Budget on this tab should be for the first five years of actual operations.							*NOTE: State assumptions that are being made in the section provided below.
Total Revenue		3,575,374	3,799,054	5,076,714	6,154,060	7,532,569	
Total Expenses		3,144,178	3,598,568	4,982,617	5,687,995	6,432,376	
Net Income (Before Cash Flow Adjustments)		431,196	200,486	94,096	466,065	1,100,193	
Budgeted Student Enrollment		124	186	248	310	372	
		Year 1 2024-25	**Year 2 2025-26**	**Year 3 2026-27**	**Year 4 2027-28**	**Year 5 2028-29**	
EXPENSES							
ADMINISTRATIVE STAFF PERSONNEL COSTS	Year 1 No. of Positions						*NOTE: For all 5-Years of FTE/Staffing detail please see the 'Staffing' tab of this file.*
Executive Management	1.00	150,000	156,000	162,240	168,730	175,479	based on hiring plan found under "Staffing Plan"
Instructional Management	1.00	110,000	114,400	118,976	233,735	243,084	based on hiring plan found under "Staffing Plan"
Deans, Directors & Coordinators	1.00	110,000	114,400	118,976	123,735	238,684	based on hiring plan found under "Staffing Plan"
CFO / Director of Finance	1.00	92,000	95,680	99,507	103,487	107,627	based on hiring plan found under "Staffing Plan"
Operation / Business Manager	1.00	84,000	87,360	90,854	94,489	98,268	based on hiring plan found under "Staffing Plan"
Administrative Staff	1.00	60,000	62,400	124,896	129,892	135,088	based on hiring plan found under "Staffing Plan"
TOTAL ADMINISTRATIVE STAFF	6.00	606,000	630,240	715,450	854,068	998,230	
INSTRUCTIONAL PERSONNEL COSTS							
Teachers - Regular	11.00	715,000	938,600	1,171,144	1,477,990	1,797,109	based on hiring plan found under "Staffing Plan"
Teachers - SPED	3.00	195,000	202,800	275,912	351,948	431,026	based on hiring plan found under "Staffing Plan"
Substitute Teachers	-	-	-	-	-	-	based on hiring plan found under "Staffing Plan"
Teaching Assistants	3.00	165,000	171,600	178,464	185,603	193,027	based on hiring plan found under "Staffing Plan"
Specialty Teachers	3.00	195,000	202,800	210,912	219,348	228,122	based on hiring plan found under "Staffing Plan"
Aides	-	-	-	-	-	-	based on hiring plan found under "Staffing Plan"
Therapists & Counselors	1.00	70,000	72,800	75,712	78,740	81,890	based on hiring plan found under "Staffing Plan"
Other	-	-	-	-	-	-	
TOTAL INSTRUCTIONAL	21.00	1,340,000	1,588,600	1,912,144	2,313,630	2,731,175	
NON-INSTRUCTIONAL PERSONNEL COSTS							
Nurse	-	-	-	-	-	-	
Librarian	-	-	-	-	-	-	
Custodian	-	-	-	-	-	-	
Security	-	-	-	-	-	-	
Other	-	-	-	-	-	-	
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-	
SUBTOTAL PERSONNEL SERVICE COSTS	27.00	1,946,000	2,218,840	2,627,594	3,167,697	3,729,405	
PAYROLL TAXES AND BENEFITS							
Payroll Taxes		99,237	147,259	180,609	212,935	238,275	estimates as per existing data from Classical (5.3%)
Fringe / Employee Benefits		168,516	176,711	216,731	255,522	285,930	estimates as per existing data from Classical (9%)
Retirement / Pension		56,172	58,904	72,244	85,174	95,310	estimates as per existing data from Classical (3%)
TOTAL PAYROLL TAXES AND BENEFITS		323,925	382,873	469,583	553,631	619,515	
TOTAL PERSONNEL SERVICE COSTS	27.00	2,269,925	2,601,713	3,097,177	3,721,328	4,348,920	
CONTRACTED SERVICES							
Accounting / Audit		25,000	25,000	25,000	25,000	25,000	pro rata cost per existing auditors
Legal		-	-	-	-	-	
Management Company Fee		-	-	-	-	-	
Nurse Services		16,250	16,250	22,750	29,250	45,500	expected costs based on SBC III nurse
Food Service / School Lunch		-	-	-	-	-	
Payroll Services		-					
Special Ed Services		10,400	10,400	13,520	17,576	22,849	OT/PT on site
Titlement Services (i.e. Title I)		-	-	-	-	-	
Other Purchased / Professional / Consulting		40,000	40,000	45,000	50,000	55,000	educational and IT consultants
TOTAL CONTRACTED SERVICES		91,650	91,650	106,270	121,826	148,349	

5 YEAR BUDGET AND CASH FLOW ADJUSTMENTS *NOTE: Projected Five Year Budget on this tab should be for the first five years of actual operations.	SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD 2024-25 THROUGH 2028-29					DESCRIPTION OF ASSUMPTIONS *NOTE: State assumptions that are being made in the section provided below.
Total Revenue	3,575,374	3,799,054	5,076,714	6,154,060	7,532,569	
Total Expenses	3,144,178	3,598,568	4,982,617	5,687,995	6,432,376	
Net Income (Before Cash Flow Adjustments)	431,196	200,486	94,096	466,065	1,100,193	
Budgeted Student Enrollment	124	186	248	310	372	
	Year 1 2024-25	**Year 2 2025-26**	**Year 3 2026-27**	**Year 4 2027-28**	**Year 5 2028-29**	
SCHOOL OPERATIONS						
Board Expenses	-	250	250	250	250	assumptions based on actual same-grade Classical history
Classroom / Teaching Supplies & Materials	20,700	25,300	27,830	30,613	33,674	assumptions based on actual same-grade Classical history
Special Ed Supplies & Materials	1,800	2,500	3,125	3,906	4,883	assumptions based on actual same-grade Classical history
Textbooks / Workbooks	18,000	20,600	21,218	21,855	22,510	assumptions based on actual same-grade Classical history
Supplies & Materials other	54,000	65,000	70,000	75,000	80,000	assumptions based on actual same-grade Classical history
Equipment / Furniture	43,200	52,800	58,080	63,888	70,277	assumptions based on actual same-grade Classical history
Telephone	1,080	1,200	1,200	1,200	1,200	assumptions based on actual same-grade Classical history
Technology	18,000	20,000	20,000	20,000	20,000	assumptions based on actual same-grade Classical history
Student Testing & Assessment	3,600	5,000	6,250	7,813	9,766	assumptions based on actual same-grade Classical history
Field Trips	900	5,000	10,000	15,000	20,000	assumptions based on actual same-grade Classical history
Transportation (student)	13,500	16,500	18,150	19,965	21,962	assumptions based on actual same-grade Classical history
Student Services - other	900	1,250	1,563	1,953	22,000	assumptions based on actual same-grade Classical history
Office Expense	7,650	8,755	9,018	9,288	9,567	assumptions based on actual same-grade Classical history
Staff Development	-	13,500	18,225	24,604	33,215	assumptions based on actual same-grade Classical history
Staff Recruitment	-	5,000	6,250	7,813	9,766	assumptions based on actual same-grade Classical history
Student Recruitment / Marketing	-	2,000	2,000	2,000	2,000	assumptions based on actual same-grade Classical history
School Meals / Lunch	15,959	25,883	33,319	40,183	46,618	assumptions based on actual same-grade Classical history
Travel (Staff)	-	600	700	800	1,000	assumptions based on actual same-grade Classical history
Fundraising	-	3,000	3,000	3,000	3,000	assumptions based on actual same-grade Classical history
Other	-	10,000	7,500	5,000	2,500	assumptions based on actual same-grade Classical history
TOTAL SCHOOL OPERATIONS	199,289	284,138	317,677	354,130	414,187	
FACILITY OPERATION & MAINTENANCE						
Insurance	23,445	25,789	28,368	31,205	34,325	D&O and other insurance
Janitorial	15,000	15,000	60,000	60,000	60,000	part time support staff
Building and Land Rent / Lease / Facility Finance Interest	347,870	507,777	1,280,000	1,305,600	1,331,712	based on 15,000 square feet for 2 years, permanent space thereafter
Repairs & Maintenance	2,000	2,500	3,125	3,906	4,883	period plumbing and electric repairs
Equipment / Furniture	90,000	40,000	40,000	40,000	40,000	basic equipment and furniture
Security	-	-	20,000	20,000	20,000	alarms, cameras, etc install at permanent site
Utilities	30,000	30,000	30,000	30,000	30,000	based on previous incubation space data
TOTAL FACILITY OPERATION & MAINTENANCE	508,314	621,067	1,461,493	1,490,711	1,520,920	
DEPRECIATION & AMORTIZATION	-	-	-	-	-	none assumed
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	75,000	-	-	-	-	
TOTAL EXPENSES	3,144,178	3,598,568	4,982,617	5,687,995	6,432,376	
NET INCOME	431,196	200,486	94,096	466,065	1,100,193	

5 YEAR BUDGET AND CASH FLOW ADJUSTMENTS	SOUTH BRONX CLASSICAL CHARTER SCHOOL V PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD 2024-25 THROUGH 2028-29					DESCRIPTION OF ASSUMPTIONS
*NOTE: Projected Five Year Budget on this tab should be for the first five years of actual operations.						*NOTE: State assumptions that are being made in the section provided below.
Total Revenue	3,575,374	3,799,054	5,076,714	6,154,060	7,532,569	
Total Expenses	3,144,178	3,598,568	4,982,617	5,687,995	6,432,376	
Net Income (Before Cash Flow Adjustments)	431,196	200,486	94,096	466,065	1,100,193	
Budgeted Student Enrollment	124	186	248	310	372	
	Year 1 2024-25	Year 2 2025-26	Year 3 2026-27	Year 4 2027-28	Year 5 2028-29	
ENROLLMENT - *School Districts Are Linked To Above Entries*						
PRIMARY School District: New York City Department of Education	124	186	248	310	372	
Other District 1:	-	-	-	-	-	
Other District 2:	-	-	-	-	-	
Other District 3:	-	-	-	-	-	
Other District 4:	-	-	-	-	-	
Other District 5:	-	-	-	-	-	
Other District 6:	-	-	-	-	-	
Other District 7:	-	-	-	-	-	
Other District 8:	-	-	-	-	-	
Other District 9:	-	-	-	-	-	
Other District 10:	-	-	-	-	-	
Other District 11:	-	-	-	-	-	
Other District 12:	-	-	-	-	-	
Other District 13:	-	-	-	-	-	
Other District 14:	-	-	-	-	-	
All Other School Districts	-	-	-	-	-	
TOTAL ENROLLMENT	124	186	248	310	372	
REVENUE PER PUPIL	28,834	20,425	20,471	19,852	20,249	
EXPENSES PER PUPIL	25,356	19,347	20,091	18,348	17,291	
CASH FLOW ADJUSTMENTS						
OPERATING ACTIVITIES						
Example - Add Back Depreciation	-	-	-	-	-	
Other	-	-	-	-	-	
Total Operating Activities	-	-	-	-	-	
INVESTMENT ACTIVITIES						
Example - Subtract Property and Equipment Expenditures	-	-	-	-	-	
Other	-	-	-	-	-	
Total Investment Activities	-	-	-	-	-	
FINANCING ACTIVITIES						
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	-	
Other	-	-	-	-	-	
Total Financing Activities	-	-	-	-	-	
Total Cash Flow Adjustments	-	-	-	-	-	
NET INCOME	431,196	200,486	94,096	466,065	1,100,193	
Beginning Cash Balance	-	431,196	631,682	725,778	1,191,843	
ENDING CASH BALANCE	431,196	631,682	725,778	1,191,843	2,292,036	

5 Year Fiscal Impact Report:

5-YEAR FISCAL IMPACT REPORT

Largest Enrollment District: New York City Department of Education							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for New York City Department of Education School District	Projected Impact (% of District's Total Budget)
Year 1 (2024-25)	124	18,707	2,319,643	-	2,319,643	37,500,000,000	0.006%
Year 2 (2025-26)	186	19,081	3,549,054	-	3,549,054	37,500,000,000	0.009%
Year 3 (2026-27)	248	19,463	4,826,714	-	4,826,714	37,500,000,000	0.013%
Year 4 (2027-28)	310	19,852	6,154,060	-	6,154,060	37,500,000,000	0.016%
Year 5 (2028-29)	372	20,249	7,532,569	-	7,532,569	37,500,000,000	0.020%

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	https://www.schools.nyc.gov/about-us/funding/funding-our-schools
OTHER NOTES:	

Second Largest Enrollment District: N/A							
A	B	C	D (B X C)	E	F (D + E)	G	H (F ÷ G)
Operational Year	Enrollment (Number of Students)	Per Pupil Rate	Per Pupil Aid	Other District Revenue (SPED Funding, Food Service, Grants, Etc.)	Total Funding to Charter School From District	* Total General Fund Operating Budget for Select from drop-down list → School District	Projected Impact (% of District's Total Budget)
Year 1 (2024-25)	-	-	-	-	-	-	#DIV/0!
Year 2 (2025-26)	-	-	-	-	-	-	#DIV/0!
Year 3 (2026-27)	-	-	-	-	-	-	#DIV/0!
Year 4 (2027-28)	-	-	-	-	-	-	#DIV/0!
Year 5 (2028-29)	-	-	-	-	-	-	#DIV/0!

DESCRIPTION OF SOURCE FOR PRIMARY DISTRICT'S OPERATING BUDGET:	
OTHER NOTES:	

R-21f – Letters of Commitment

f. Letters of Commitment

Attach letters of commitment for any funding from private contributions, grant funds, or other philanthropic sources included in the school budget. List the amounts and the anticipated uses for the funding.

As an organization with several replication experiences, Classical has established a board of trustees that is able to support the development of SBCCS V. These commitments are not in writing; however, our 18 years of history has shown that Classical can both (a) operate schools with a financial discipline that does not require large levels of support (if any at all) and (b) ensure that fundraising and foundational support (with some foundations providing us support for nearly a decade).

R-21g – Non-SUNY Financials

g. Non-SUNY Financials

This Request pertains only to applicants associated with one or more private or charter schools that SUNY does not authorize. All other applicants should indicate, "Request is not applicable" in response to this Request.

Attach the following documents covering the last five years for each private or charter school that SUNY did not authorize including any out-of-state school that is currently associated with a replicating applicant:

- IRS Forms 990;
- Audited financial statements; and,
- Management or Advisory Letters from the independent auditor (if applicable).

NOTE: This Request seeks charter-level information about individual charters. Applicants seeking to replicate under a larger network should submit a Business Plan completed by the network in conjunction with the proposal, which requests similar information at the network level. See the Business Plan Overview and Requirements for Applicants located in Appendix C. If information responsive to this Request is contained in a Business Plan, reference the Business Plan in this Response.

Note for Replicators:

- SUNY authorized charter schools applying for the authority to operate one or more additional SUNY authorized charter schools must submit two five-year budgets for response 21-e: one budget reflecting only the new proposed school, and one budget reflecting the five year projected budget for the entire education corporation should the new school(s) be approved.

What to Submit:

- Submit the response to Requests 21(a-d) as a Microsoft Word® file named: R21ad- Fiscal Soundness.
- Attach the Budget Template as a Microsoft Excel® file named: R-21e- Budget Template.
- Attach Letters of Commitment as a Microsoft Word® or Adobe Acrobat® file named: R-21f- Letters of Commitment.
- Attach Non-SUNY Financials as an Adobe Acrobat® file named: R-21g- Non-SUNY Financials.

Note: 990 Form and Financial Statements are located in separate attachments.

Tax Exemption:

May 13, 2015

Classical Charter Schools
977 Fox Street
Bronx, New York 10459

Dear Sir or Madam:

The Tax Law exempts New York State governmental entities such as your organization, Classical Charter Schools, from the payment of New York State and local sales and use taxes on their purchases. In order to make tax exempt purchases, a New York State governmental entity must present vendors with the entity's official purchase order or other documentation (e.g., payment voucher, contract of sale, Form AC 946, *Tax Exemption Certificate*, Form ST-129, *Exemption Certificate - Tax on occupancy of hotel rooms*, etc.) which indicates that the purchaser is a New York State governmental entity.

Tax exemption numbers and Form ST-119.1, *Exempt Organization Exempt Purchase Certificate*, are not issued to New York State governmental entities. If a vendor requests a tax exemption number or Form ST-119.1, *Exempt Organization Exempt Purchase Certificate*, from you, Classical Charter Schools may give the vendor a copy of this letter. This will assure the vendor that a governmental purchase order, or other evidence that Classical Charter Schools is the purchaser, and this letter are the only documentation the vendor needs in order to not collect sales tax.

For additional information, please refer to Publication 843, *A Guide to Sales Tax in New York State for Exempt Organizations*, which is available on the New York State Tax Department website at www.tax.ny.gov.

New York State Department of Taxation and Finance
OTPA-Taxpayer Guidance Division
Sales Tax Exempt Organizations Unit

R-22 – Action Plan

Provide a detailed action plan outlining the steps the founding group will undertake to ensure a successful startup. In a well-organized chart, the action plan should include:

- All projected key steps in the pre-opening period (from SUNY approval through the commencement of instruction) including, but not limited to securing a facility inclusive of any necessary construction; hiring personnel; setting up organizational, legal, and financial structures; securing funding; and, selecting or developing critical aspects of the school's academic program including the curriculum;
- The start date and projected completion date of each task; and,
- The person(s) responsible for each task.

The Institute encourages applicants to take into account potential challenges (e.g., procurement delays, availability of materials, etc.) in the development of the action plan.

What to Submit:

- Submit the response to Request 22 as a Microsoft Word® or Excel® file named: R-22- Action Plan.

SBCCS V has developed a Pre-Opening Plan that is based off the openings and experiences of school leaders at the other South Bronx Classical Charter School sites. The task list below includes the responsible person for task execution. Subsequent to approval of this Charter Application, daily tactical meetings will be held to discuss, develop, and modify the detailed Plan.

TASK SUMMARY FROM APPROVAL TO INITIAL OPENING		
Task	**Date**	**Responsibility**
Revise interim budget	Nov-24	DB
Start Recruitment	Nov-24	DT
Create a comprehensive list and schedule of purchases	Jan-25	OM
Setup SBC V in Powerschool	Jan-25	OM
Provide OPT with scholar name and addresses	Jan-25	OM
Hire school professionals	Jan-25	DT
Set up computer network system	Mar-25	DB
Install and connect infrastructure (lights, phones computer)	Mar-25	OM
Purchase Labor Law posters	Mar-25	DB
Setup SBC V in Intacct	Mar-25	DB
Open bank account for Escrow	Mar-25	DB
Hire pro bono attorney	Apr-25	ED
Complete all purchasing	Apr-25	OM
Finalize location	Apr-25	ED/DB
Board passes all policies, by-laws, handbooks, annual budget	Apr-25	ED
Contact insurance broker for benefits, D&O, Workers Comp	Apr-25	DB
Conduct lottery	Apr-25	OM
Identify Scholars with IEPs	May-25	SD

Purchase classroom equipment and furniture	May-25	OM
Setup Employees in ADP	May-25	DB
Hold Board of Trustees Annual Meeting	May-25	ED
Design forms: check request, expense report, reimbursement	May-25	DB
Hold inaugural Family Advisory Council meeting	May-25	OM
Apply for parking permits	May-25	OM
Schedule vision screenings	May-25	OM
Enter transit check program	May-25	DB
Submit BEDS Data	May-25	DB
Meet with Office of School Food	May-25	OM
Collect all required scholar forms, including HLQ	Jun-25	OM
Set up phone systems and answering service	Jun-25	OM
Ensure staff have CPR, First Aid, and AED training and supplies	Jun-25	OM
Complete Project SAVE plan and submit to SED	Jun-25	SD
Purchase or lease one copier	Jun-25	OM
Ensure building has School Nurse	Jun-25	SD
Family orientations	Jun-25	OM
Obtain all student records (including immunization forms)	Jun-25	OM
Hire Related Service Providers	Jun-25	SD
File per pupil invoice with NYSED and DOE	Jun-25	DB
Submit IRS SS-4, W-9 Registration, NYS Exemption Certificate	Jun-25	DB
Hire an auditor	Jun-25	ED
Receive all scholar IEPs	Jul-25	SD
WELCOME SCHOLARS!	Aug-25	ALL
Submit Consolidated Application for Title Funding	Aug-25	DB
Hold staff professional development	Aug-25	ED, DCI
Hire three interns	Aug-25	SD
Request BEDS number from Office of New Schools	Aug-25	OM
Enter student information in ATS	Sep-25	OM
Collect free/reduced lunch forms	Sep-25	OM
Mail memo to parents with bus stops and schedule	Sep-25	OM
Complete Transportation Request Form for OPT	Sep-25	OM

KEY:
ED = Executive Director
DCI = Director of Curriculum and Instruction
SD = School Director
DT = Director of Talent
OM = Operations Manager
DB = Director of Business

R-23a – Supplemental Narrative

a. Supplemental Narrative

If there is any additional information that would help the Institute and SUNY Trustees evaluate the proposal, please describe it here and provide a rationale for its inclusion. If no supplementary information is necessary, please indicate that this Request is not applicable.

This request is not applicable.

R-23b – Supplemental Attachments

b. Supplemental Attachments

Submit attachments, documents, etc., discussed in response to (a) above. If no supplemental documents are necessary, please indicate that this Request is not applicable.

This request is not applicable.

What to Submit:

- Submit the response to Request 23(a) as a Microsoft Word® file named: R-23a- Supplemental Narrative.
- Attach Supplemental and Support Documents as a Microsoft Word® or Excel, or Adobe Acrobat® file(s) named: R-23b- Supplemental Attachments.

Strategic Growth Plan Narrative

Applicant groups who operate an existing SUNY authorized charter school or schools and are applying for authority to operate one or more additional SUNY authorized schools, and who are not otherwise required to submit a Business Plan, must provide a Strategic Growth Plan Narrative. The narrative response should not exceed 30 pages, though applicant groups are welcome to submit additional exhibits to support the narrative. Strategic Growth Plan Narratives are only used for Institute analysis.

In the response, applicants should provide an overall narrative explaining how the organization is preparing systems and structures to support growth such that all schools in the education corporation, including proposed new ones, can operate in an academically, fiscally, and operationally sound manner. Specifically, this must include:

- A description of the education corporation's greenlighting process to determine preparedness to apply to open additional schools;
- Discussion of how the education corporation assesses need and demand and analyzes community demographic trends to identify a proposed location that is likely to support the proposed enrollment for both the new proposed school as well as maintain enrollment at existing schools;
- Chart(s) demonstrating the proposed enrollment growth pattern across the entire education corporation for 5 years if the new school(s) were to be approved;
- A description of how student pathways through grade levels would be implemented across the education corporation if the new school(s) were to be approved;
- A reflection on the existing education corporation's successes and challenges in meeting requirements for hiring certified teachers as required by the Act, and what existing or new systems and supports would be in place to support ongoing compliance with this requirement;
- An analysis of opportunities and potential challenges in staffing an additional location, including discussion of strategies to support a robust talent pipeline for teachers as well as instructional and operational leaders;
- A description of what services would be shared across schools in the ed corp, including a shared services team if applicable, including what shared services would be applicable, who would be responsible for providing them, how the organization would provide development and planning to support these shared services, and methods by which the effectiveness of shared services would be assessed;
- A reflection on prior academic performance across existing schools within the education corporation which discusses key strengths and key growth areas, the opportunities and challenges associated with opening more schools as relates to academic performance, and plans to address the identified growth areas;
- Discussion of how the board's approach to governance would shift to ensure effective oversight if the new school(s) were approved;
- Discussion of any key efficiencies the education corporation believes it would realize if the new schools were to be approved; and,
- Discussion of any key challenges the education corporation has identified related to replication, and what steps will be taken to address those potential challenges if the new schools were to be approved.

NOTE: In addition to the Strategic Growth Plan Narrative, applicant groups that currently operate one or more SUNY authorized charter school(s) and are applying for authority to operate additional SUNY authorized charter schools must also submit two five year budget templates in Response 21e, one for the new proposed school, and one for the overall education corporation should the new school(s) be approved.

What to Submit:

- Submit the response, not exceeding 30 pages, to Strategic Growth Plan Narrative as a Microsoft Word® or Adobe Acrobat® file named: Strategic Growth Plan Narrative.

South Bronx Classical Charter School V

Strategic Growth Plan Narrative

- A description of the education corporation's greenlighting process to determine preparedness to apply to open additional schools;

South Bronx Classical Charter Schools was founded in 2006 and, since then, we have only expanded to open four schools. SBCCS IV, our newest school, opened in 2017. This slow growth is intentional, as we want to ensure our current schools are operating successfully before taking the leap to establish a new school. Our network's strengths that we intend on carrying over to SBCCS V include systems codification and organizational intelligence, curriculum development, scholar academic performance and character building, parent satisfaction, and teacher and leadership training. Our leadership team considers current success in these areas before deciding to open a new school. We also consider community and district demand as it relates to potential enrollment and family satisfaction with our school model. It should be noted that SBCCS V will be a separate education corporation from the consolidated one that embodies our other charters and that is overseen by the New York State Board of Regents. Nonetheless, SBCCS V will feature the same program and will benefit from our network's expertise and experience.

- Discussion of how the education corporation assesses need and demand and analyzes community demographic trends to identify a proposed location that is likely to support proposed enrollment for both the new proposed school as well as maintain enrollment at existing schools;

Reflecting upon district and charter school performance in recent years, there is a need for educational reform across several districts in the South Bronx. We are interested in expanding to either District 8, 10, or 11. Average State Test pass rates in these districts fall below the pass rates we have achieved across our network, and we are confident we can bring educational excellence to new districts in the South Bronx by opening a new school location.

We do not currently have any operating charter schools in Districts 8, 10, or 11, and these districts are not heavily occupied by charter schools. Based on our conversations with directors of local Head Start programs and preschools in District 8, and families in the community, there is interest in the potential opening of a South Bronx Classical Charter School in this district.

- Chart(s) demonstrating the proposed enrollment growth pattern across the entire education corporation for 5 years if the new school(s) were to be approved;

	SBC I	SBC II	SBC III	SBC IV	SBC V	TOTAL
2025-2026	520	342	510	[redacted]	[redacted]	[redacted]
2026-2027	520	360	510	[redacted]	[redacted]	[redacted]
2027-2028	520	360	510	[redacted]	[redacted]	[redacted]
2028-2029	520	360	510	[redacted]	[redacted]	[redacted]
2029-2030	520	360	510	[redacted]	[redacted]	[redacted]

Below is a table showing the first year of SBC V's opening (2025-2026):

CLASSICAL CHARTER SCHOOLS 2025-2026						
Grade	**SBC I**	**SBC II**	**SBC III**	**SBC IV**	**SBC V**	**TOTAL**
K	85	40	85	90	70	**370**
1	77	35	75	73	70	**330**
2	62	21	64	57		**204**
3	60	30	61	51		**202**
4	57	30	57	40		**184**
5	44	41	40	55		**180**
6	46	44	50	65		**205**
7	39	54	55	42		**190**
8	49	47	41	19		**156**
TOTAL	**519**	**342**	**528**	[redacted]	[redacted]	[redacted]

- A description of how student pathways through grade levels would be implemented across the education corporation if the new school(s) were to be approved;

If the new school were to be approved, this would not impact student pathways through grade levels across the network. SBCCS V would uphold the same expectations for promotion as the other South Bronx Classical Charter Schools. Scholars must demonstrate proficiency in core subjects to move successfully from grade to grade and be fully prepared for the next grade. The school will provide daily and weekly supports throughout the year to ensure all scholars have a full opportunity to master the material. This includes daily small group intervention and reteach blocks, after-school homework help, and Summer Learning Academy. Our assessment system ensures scholars' deficiencies and strengths are evidenced quickly, so remediation can occur more urgently.

For promotion, scholars must

- pass all core subjects as evidenced by a 70% year-end average in each subject;
- in Kindergarten to 2nd grade, pass our Common Core-aligned Internal Assessment;
- in 3rd to 8th grade, achieve a '3' or a '4' on the relevant Common Core aligned New York State ELA and Math tests, and the relevant New York State Science tests;
- pass the related end of year Fountas & Pinnell Reading Level Assessment;
- have no more than 15 days unexcused absences during the school year; and
- demonstrate growth in consistently displaying the character pillars

If a scholar fails a core subject or does not demonstrate proficiency or mastery on required State exams, the scholar must attend Summer Learning Academy for the opportunity to be promoted to the next grade level. Teachers are included in all conversations regarding retention to ensure validity of all decisions. Families receive immediate phone calls and letters for all scholar absences, and a meeting with parents will be arranged when the scholar is within three absences of the promotion limit. If students have between 15 and 22 unexcused absences, they can attend our Summer Learning Academy to be possibly eligible for promotion.

The CCS educational program, curriculum, and assessments that SBCCS V will utilize are Common Core-aligned. Therefore, all academic promotion standards relate directly to Common Core Learning Standards as adopted by New York State.

- A reflection on the existing education corporation's successes and challenges in meeting requirements for hiring certified teachers as required by the Act, and what existing or new systems and supports would be in place to support ongoing compliance with this requirement;

CCS is committed to meeting requirements for certification amongst our staff and we have developed a program, the ClassiCorps Teaching Fellowship program, to support this effort.

In addition to reimbursing teachers in their process of gaining certification, Classical supports the certification process by completing the following:

- Send all incoming ClassiCorps Fellows certification instructions.
- At each deadline, we check our internal tracker and/or the TEACH website to ensure that all incoming CC Fellows completed the required task(s).
- We follow up with incoming CC Fellows that did not meet the deadline.
- We provide professional development on certification and offer certification office hours.
- We answer questions about the certification process from teachers as needed.
- Lastly, we meet with Relay Graduate School of Education team (typically once a month).

Our four (4) Classical schools are limited to a total of 15 uncertified teachers each. Currently, each school has an average of 18 uncertified teachers. We are working to reduce that number by October.

- An analysis of opportunities and potential challenges in staffing an additional location, including discussion of strategies to support a robust talent pipeline for teachers as well as instructional and operational leaders;

SBCCS prioritizes internal staff development, with teachers, and instructional and operational leaders. With monthly professional development and at-least weekly individualized coaching from Grade Team Leaders and Instructional Coaches, our teachers are continuously progressing and are often prepared for promotion. Associate Teachers and Learning Specialists may be promoted to Lead Teacher roles and Lead Teachers may be promoted to Grade Team Leadership. 64% of our current Instructional Coaching staff have served as teachers then Grade Team Leaders at a South Bronx Classical Charter School prior to this role. 42% of our deans have served as teachers or Grade Team Leaders at a South Bronx Classical Charter School prior to this role. All current and past School Directors have previously taught or coached at SBCCS before moving into that leadership position.

While CCS does a nice job with internal staff development and promotion, there is a current statewide shortage of teachers. We are hopeful that, given our strong track record of student performance as well as teacher development, we will be able to continue attracting high numbers of applicants for teaching roles in the years ahead. For context, in hiring for the 2024-2025 school year, Classical hires about 1%-4% of its applicants, depending on the role.

- A description of what services would be shared across schools in the education corporation, including a shared services team if applicable, including what shared services would be applicable, who would be responsible for providing them, how the organization would provide development and planning to support these shared services, and methods by which the effectiveness of shared services would be assessed;

SBCCS V will utilize the Classical Charter Schools (CCS) organizational structure, school model, and curriculum. We will implement the same structure for leadership, including Grade Team Leaders, Instructional Coaches, and Deans of Students. The school model and daily schedule will replicate that of the existing CCS, and the curricular scope and materials will be shared as well, to ensure alignment. The goal is for the school to be as aligned as possible with the existing CCS.

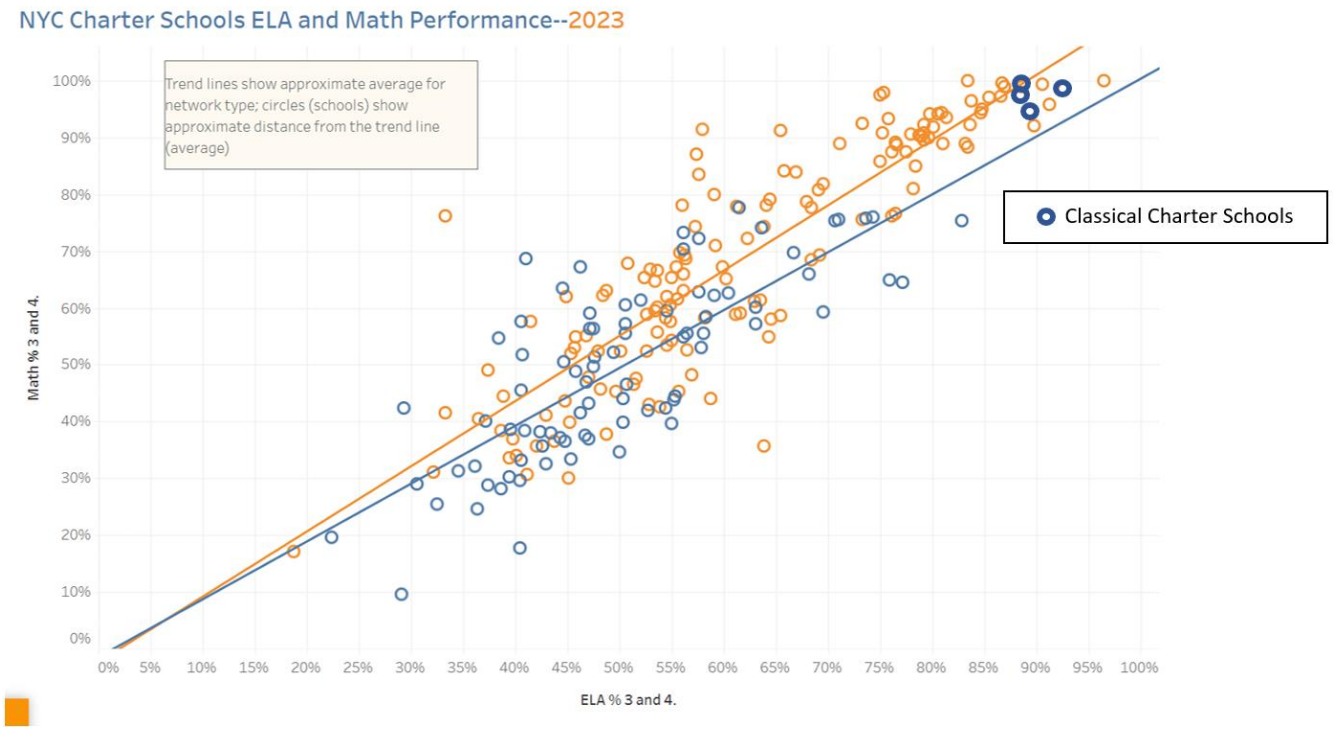
On the network level, SBCCS V will have support from our main departments. These departments include:

1) The Business team manages all school finances and oversees Human Resources.
2) The Data team supports the maintenance and innovation of our data collection systems.
3) The Talent team manages staff recruitment, interviews, and onboarding.
4) The Director of Scholar Services oversees special education mandates and develops the network's special education teachers, speech pathologists, school psychologists and counselors.
5) The Director of Curriculum & Instruction has oversight over all curriculum, assessment protocol, and the development of our Curriculum and Instructional Coaching teams.

- A reflection on prior academic performance across existing schools within the education corporation which discusses key strengths and key growth areas, the opportunities and challenges associated with opening more schools as relates to academic performance, and plans to address the identified growth areas;

SBCCS V will adopt the same research-backed curriculum that was developed by CCS instructional leaders. CCS has demonstrated a record of academic achievement and progress through its distinct school model and curriculum, which will be replicated in SBCCS V.

Ranked by pass-rate above its Community School District, the New York City Charter School Center ranks Classical Charter Schools amongst the highest performing charter networks in New York City. More specifically, our schools ranked #2 (SBC III), #6 (SBC IV), #7 (SBC I), and #8 (SBC II) in NYC Charter School ELA and Math Performance in 2023. As a network, Classical Charter Schools had the highest pass rates of all NYC charter networks in 2021, 2022, and 2023.

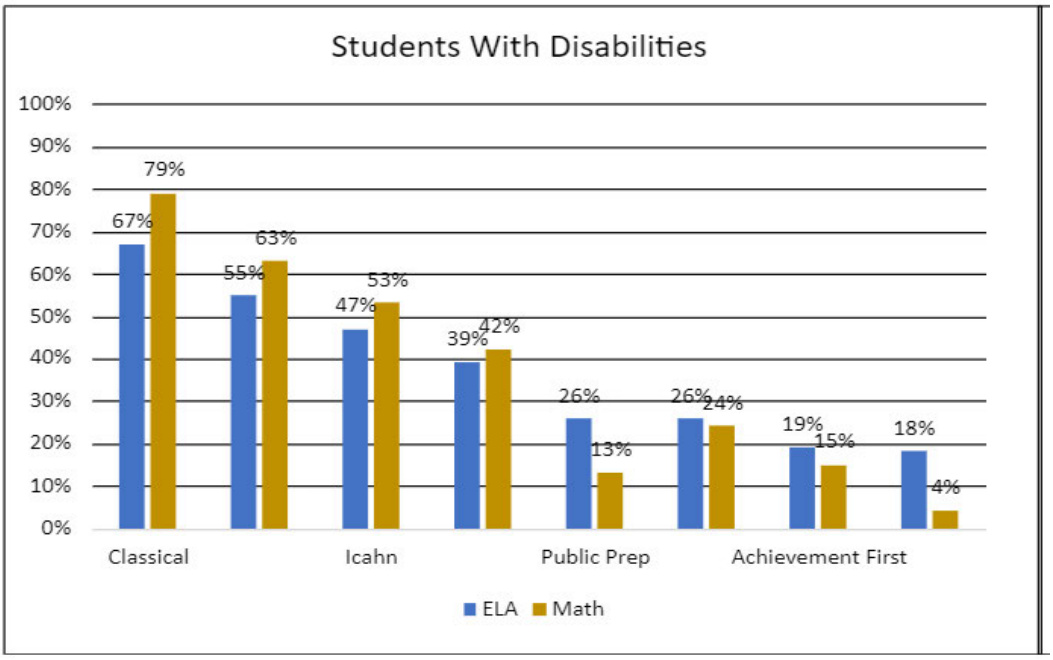


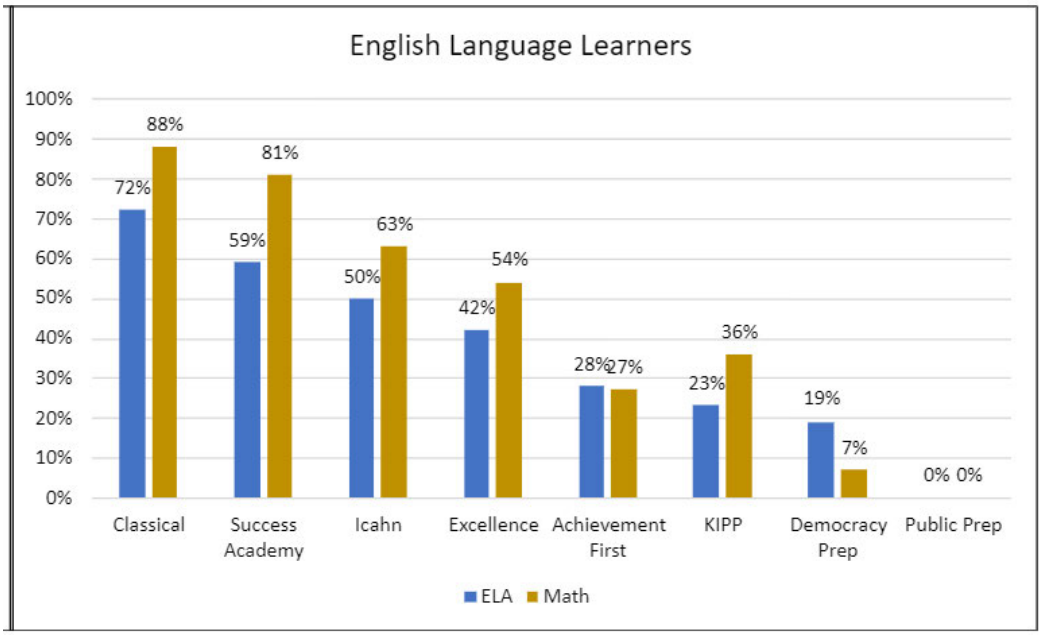
The following chart summarize CCS's success, including a comparison to other New York City charter schools:

	ELA		MATH	
	2023	2022	2023	2022
Classical Charter Schools	**90%**	**88%**	**98%**	**90%**
Success Academies	80%	76%	92%	83%
Achievement First	53%	51%	59%	41%
Icahn Charter Schools	84%	77%	92%	79%
Ascend	60%	55%	59%	49%
KIPP	55%	51%	69%	49%
Uncommon Schools	54%	53%	63%	40%
Public Prep	48%	49%	46%	33%
Democracy Prep	49%	49%	43%	21%
Explore Schools	49%	46%	58%	32%
Zeta Charter Schools	76%	63%	87%	69%
Village Academies	75%	58%	87%	52%
Brooklyn Prospect	76%	70%	78%	58%
Excellence Community	71%	65%	86%	64%

The CCS network boasts strengths in ELA and Math standards mastery, as evidenced by our strong pass rates for the NY State Tests. This work begins in kindergarten and progresses through the grades, and is possible because of our rigorous, standards-aligned curriculum and our strategic teacher development program. Our daily schedule and curriculum allow extended time with literacy-based and mathematics instruction, both leveraging opportunity for whole and small group instruction across the day.

One focus area for CCS and SBCCS V will be better prioritizing the needs of Students with Disabilities and English Language Learners. While our ELA and Math pass rate data for these populations exceeds that of other NY charter networks, we recognize that there is still work to be done in this area, and particularly if we open an additional school. Staffing and staff development must be strategic with the opening of a new school to ensure that expertise is carried over. Both general and special education teachers must be well-versed in differentiation strategies to support these populations with our existing curriculum and school structure. CCS's Director of Scholar Services will help develop and support the special education teachers and Scholar Services Team (SST) Manager at SBCCS V. These individuals will then, in turn, share these best practices with general education teachers with whom they work closely with.





- Discussion of how the board's approach to governance would shift to ensure effective oversight if the new school(s) were approved;

The board's approach to governance would not shift significantly. SBCCS V would have a different board comprised of the same people, so the level of expertise and knowledge of our network would remain. The board meetings would be held on the same days, but SBCCS V would be overseen separately. The board would increase visits and collaboration at SBCCS V to ensure effective oversight and a greater familiarity with the community and school.

- Discussion of any key efficiencies the education corporation believes it would realize if the new schools were to be approved; and,

The approval of a new school would enable us to expand our teaching and instructional leader staff, potentially bringing in new talent with different areas of expertise and continuing to promote our top talent from within. We will also be able to develop more skilled educators in the community not only through certification opportunities but our in-house teacher development programs.

Opening a new school will also enable us to practice the process of replication, which will help leadership assess our current strengths and areas for growth regarding systems for new school openings.

Most significantly, the approval of SBCCS V would allow more children in the South Bronx the opportunity to receive a 'Classical' education.

- Discussion of any key challenges the education corporation has identified related to replication, and what steps will be taken to address those potential challenges if the new schools were to be approved.

Because the proposed school would be chartered by a different authorizer (SUNY), as compared to NYSED which authorizes the other four Classical schools, there would be a small amount of additional paperwork (charter renewals, revisions, annual audits, etc.). This would almost totally lie at the governance level; the schools would not be greatly affected. We would need to learn if there would need to be a separate bank account, per pupil funding processes, and staff allocation efforts. For these much smaller issues, we would consult with our legal team to ascertain the proper process.

Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

A For the 2022 calendar year, or tax year beginning JUL 1, 2022 **and ending** JUN 30, 2023

B Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/ terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
CLASSICAL CHARTER SCHOOLS

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) [redacted] Room/suite

City or town, state or province, country, and ZIP or foreign postal code [redacted]

D Employer identification number [redacted]

E Telephone number [redacted]

G Gross receipts $ 43,557,328.

F Name and address of principal officer: LESTER LONG
SAME AS C ABOVE

H(a) Is this a group return for subordinates? ☐ Yes ☒ No

H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list. See instructions

H(c) Group exemption number

I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: WWW.CLASSICALCHARTERSCHOOLS.ORG

K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation: 2012 **M** State of legal domicile: NY

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: TO PREPARE K-8TH GRADE STUDENTS IN THE SOUTH BRONX TO EXCEL IN COLLEGE-PREPARATORY HIGH SCHOOLS.

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)	3	11
4 Number of independent voting members of the governing body (Part VI, line 1b)	4	11
5 Total number of individuals employed in calendar year 2022 (Part V, line 2a)	5	426
6 Total number of volunteers (estimate if necessary)	6	11
7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.

		Prior Year	Current Year
Revenue	8 Contributions and grants (Part VIII, line 1h)	5,558,253.	8,971,251.
	9 Program service revenue (Part VIII, line 2g)	30,801,412.	32,365,844.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	158,619.	140,695.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0.	0.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	36,518,284.	41,477,790.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	22,819,955.	25,676,289.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) 246,869.		
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	14,752,061.	15,480,517.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	37,572,016.	41,156,806.
	19 Revenue less expenses. Subtract line 18 from line 12	-1,053,732.	320,984.

		Beginning of Current Year	End of Year
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	15,696,370.	139,796,464.
	21 Total liabilities (Part X, line 26)	6,288,356.	126,756,248.
	22 Net assets or fund balances. Subtract line 21 from line 20	9,408,014.	13,040,216.

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Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer Date

LESTER LONG, EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check if self-employed	PTIN
[redacted]	GARRETT M. HIGGINS	11/07/23	☐	[redacted]

Firm's name [redacted] Firm's EIN [redacted]

Firm's address [redacted] Phone no. [redacted]

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III X

1 Briefly describe the organization's mission:
CLASSICAL CHARTER SCHOOLS PREPARES K-8TH GRADE STUDENTS IN THE SOUTH BRONX TO EXCEL IN COLLEGE-PREPARATORY HIGH SCHOOLS. THROUGH A CLASSICAL CURRICULUM AND HIGHLY STRUCTURED SETTING, STUDENTS BECOME LIBERATED SCHOLARS AND CITIZENS OF IMPECCABLE CHARACTER WHO ACHIEVE

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ..... ☐ Yes ☒ No
If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ..... ☐ Yes ☒ No
If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: _____) (Expenses $ 35,000,045. including grants of $ 0.) (Revenue $ 32,365,844.)
WE PROVIDE OUR STUDENTS WITH A SOLID FOUNDATION FOR ACADEMIC SUCCESS THROUGH ACHIEVEMENT THAT EXCEEDS CITYWIDE AVERAGES AND MEETS OR EXCEEDS NEW YORK STATE STANDARDS AND NATIONAL NORMS IN ALL CURRICULUM AREAS TESTED, ESPECIALLY IN MATHEMATICS AND LANGUAGE ARTS. FOR THE 2022-2023 SCHOOL YEAR, WE SERVED APPROXIMATELY 1,556 STUDENTS IN KINDERGARTEN THROUGH EIGHTH GRADE.

4b (Code: _____) (Expenses $ _____ including grants of $ _____) (Revenue $ _____)

4c (Code: _____) (Expenses $ _____ including grants of $ _____) (Revenue $ _____)

4d Other program services (Describe on Schedule O.)
(Expenses $ _____ including grants of $ _____) (Revenue $ _____)

4e Total program service expenses 35,000,045.

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Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	X	
2	Is the organization required to complete *Schedule B, Schedule of Contributors*? See instructions	2	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		X
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		X
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? *If "Yes," complete Schedule C, Part III*	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		X
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? *If "Yes," complete Schedule D, Part V*	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	X	
b	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		X
c	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part*	11c		X
d	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d	X	
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	X	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	X	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	X	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13	X	
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		X
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		X
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		X
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I.* See instructions	17		X
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		X
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		X
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21		X

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Part IV Checklist of Required Schedules *(continued)*

			Yes	No
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		X
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	23	X	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a*	24a		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	25b		X
26	Did the organization report any amount on Part X, line 5 or 22, for receivables from or payab o any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35 controlled entity or family member of any of these persons? *If "Yes," complete Sched e L, Part II*	26		X
27	Did the organization provide a grant or other assistance to any current or former offi r dir ctor, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection comm e member, or to a 35% controlled entity (including an employee thereof) or family member of any of these person ? *If "Yes," c mplete Schedule L, Part III*	27		X
28	Was the organization a party to a business transaction with one of the following artie (the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):			
a	A current or former officer, director, trustee, key employee, creator or f und or su stantial contributor? *If "Yes," complete Schedule L, Part IV*	28a		X
b	A family member of any individual described in line 28a? *If "Yes," comp Schedule L, Part IV*	28b		X
c	A 35% controlled entity of one or more individuals and/or organi ns des ibed in line 28a or 28b? *If "Yes," complete Schedule L, Part IV*	28c		X
29	Did the organization receive more than $25,000 in non-cash ntributio ? *If "Yes," complete Schedule M*	29	X	
30	Did the organization receive contributions of art, historical treasu o other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections [redacted]2 and [redacted]3? *If "Yes," complete Schedule R, Part I*	33		X
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34		X
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		X
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	37		X
38	Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? **Note:** All Form 990 filers are required to complete Schedule O	38	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

				Yes	No
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	17		
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c			

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Part V Statements Regarding Other IRS Filings and Tax Compliance *(continued)*

				Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	426		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b		X	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?	3a			X
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation on Schedule O*	3b			
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a			X
b	If "Yes," enter the name of the foreign country _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a			X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b			X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c			
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a			X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b			
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for go nd services provided to the payor?	7a			X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b			
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property or which it was required to file Form 8282?	7c			X
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums a personal enefit contract?	7e			X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a person efit contract?	7f			X
g	If the organization received a contribution of qualified intellectual property, did th ganization file Form 8899 as required?	7g			
h	If the organization received a contribution of cars, boats, airplanes, or o her ehicle did the organization file a Form 1098-C?	7h			
8	**Sponsoring organizations maintaining donor advised funds.** Did dono ad ed fund maintained by the sponsoring organization have excess business holdings at any time du the year?	8			
9	**Sponsoring organizations maintaining donor advised funds**				
a	Did the sponsoring organization make any taxable distributio under s ction 4966?	9a			
b	Did the sponsoring organization make a distribution to a don donor a visor, or related person?	9b			
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?	12a			
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note:** See the instructions for additional information the organization must report on Schedule O.	13a			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a			X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation on Schedule O*	14b			
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15			X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16			X
17	**Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17			

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Part VI Governance, Management, and Disclosure. *For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.*

Check if Schedule O contains a response or note to any line in this Part VI X

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	11		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.				
b	Enter the number of voting members included on line 1a, above, who are independent	1b	11		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2			X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3			X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4			X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5			X
6	Did the organization have members or stockholders?	6			X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a			X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b			X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the r by the following:				
a	The governing body?	8a		X	
b	Each committee with authority to act on behalf of the governing body?	8b		X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who c not be reached at the organization's mailing address? *If "Yes," provide the names and addresses on edule O*	9			X

Section B. Policies *(This Section B requests information about policies not requ d by h nternal Revenue Code.)*

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		X
b	If "Yes," did the organization have written policies and procedures g ernin th ctivities of such chapters, affiliates, and branches to ensure their operations are consistent with the organ t n's exempt purposes?	10b		
11a	Has the organization provided a complete copy of this Form 990 ll mem ers of its governing body before filing the form?	11a	X	
b	Describe on Schedule O the process, if any, used by the orga ization t review this Form 990.			
12a	Did the organization have a written conflict of interest policy *f "No," g to line 13*	12a	X	
b	Were officers, directors, or trustees, and key employees required to disc an ually interests that could give rise to conflicts?	12b	X	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done*	12c	X	
13	Did the organization have a written whistleblower policy?	13	X	
14	Did the organization have a written document retention and destruction policy?	14	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	X	
b	Other officers or key employees of the organization	15b	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		X
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed NONE

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other *(explain on Schedule O)*

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records

DR. VIVIAN CASSABERRY-FURBY - [redacted]

[redacted]

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Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) LESTER LONG EXECUTIVE DIRECTOR	40.00			X				379,097.	0.	23,234.
(2) JACQUELINE DAVIS DIRECTOR OF CURRICULUM & INSTRUCTION	40.00					X		203,459.	0.	29,237.
(3) REBECCA SCOGNAMIGLIO SCHOOL DIRECTOR	40.00			X				206,499.	0.	16,725.
(4) ERIN LINNEHAN SCHOOL DIRECTOR	40.00			X				143,783.	0.	30,260.
(5) PAUL TRYON SCHOOL DIRECTOR	40.00			X				146,879.	0.	14,212.
(6) CHRISTOPHER EMMERSON-PACE INSTRUCTIONAL COACH	40.00					X		141,757.	0.	15,565.
(7) VIVIAN CASSABERRY-FURBY DIRECTOR OF BUSINESS	40.00			X				141,389.	0.	14,857.
(8) LEAH EPSTEIN DIRECTOR OF SPECIAL SERVICES	40.00					X		138,183.	0.	16,634.
(9) SAMUEL GRADESS SCHOOL DIRECTOR	40.00			X				130,174.	0.	12,848.
(10) DANILDA PEREZ DEAN	40.00					X		124,609.	0.	14,775.
(11) ANDRE HARRIS DEAN OF STUDENTS	40.00					X		122,795.	0.	12,748.
(12) JAKE ELGHANAYAN CHAIR	3.00	X		X				0.	0.	0.
(13) JAMES MAHER VICE CHAIR	3.00	X		X				0.	0.	0.
(14) VEENA MALPANI SECRETARY	3.00	X		X				0.	0.	0.
(15) MARIEL JENKINS TAYLOR TREASURER	3.00	X		X				0.	0.	0.
(16) STEPHEN BALDWIN TRUSTEE	3.00	X						0.	0.	0.
(17) KATHRYN MOORE HELENIAK TRUSTEE	3.00	X						0.	0.	0.

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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees *(continued)*

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) WILLIAM F. HIGGINS TRUSTEE	3.00	X						0.	0.	0.
(19) LAWRENCE HIRSCH TRUSTEE	3.00	X						0.	0.	0.
(20) KEVIN MURPHY TRUSTEE	3.00	X						0.	0.	0.
(21) ADRIAN TONGE TRUSTEE	3.00	X						0.	0.	0.
(22) ROBERT TORRES TRUSTEE	3.00	X						0.	0.	0.
1b Subtotal								1,878,624.	0.	201,095.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								1,878,624.	0.	201,095.

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization 38

		Yes	No
3 Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	3		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	4	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	5		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
RELAY GRADUATE SCHOOL OF EDUCATION [redacted]	FELLOWHIP PROGRAM	667,813.
CHARTER TECHNOLOGY SOLUTIONS, [redacted]	TECHNOLOGY CONSULTANT	637,763.
GREEN DUST AWAY CLEANING SERVICES, [redacted] 4 [redacted]	TECHNOLOGY CONSULTANT	402,156.
TELOPOINT INC. [redacted]	MEDICAL TESTING	265,300.
AE DEKAJ CONSTRUCTION INC [redacted]	CONSTRUCTION CONTRACTOR	140,000.

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization 7

Form **990** (2022)

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Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	7,496,007.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	1,475,244.				
	g Noncash contributions included in lines 1a-1f	1g	$ 86,944.				
	h **Total.** Add lines 1a-1f			8,971,251.			
Program Service Revenue		**Business Code**					
	2a GOV'T PER-PUPIL REVENUE	611110		32,365,844.	32365844.		
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g **Total.** Add lines 2a-2f			32,365,844.			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			213,937.			213,937.
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
			(i) Real	(ii) Personal			
	6a Gross rents	6a					
	b Less: rental expenses	6b					
	c Rental income or (loss)	6c					
	d Net rental income or (loss)						
			(i) Securities	(ii) Other			
	7a Gross amount from sales of assets other than inventory	7a	2,006,296.				
	b Less: cost or other basis and sales expenses	7b	2,079,538.				
	c Gain or (loss)	7c	-73,242.				
	d Net gain or (loss)			-73,242.			-73,242.
	8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18	8a					
	b Less: direct expenses	8b					
	c Net income or (loss) from fundraising events						
	9a Gross income from gaming activities. See Part IV, line 19	9a					
	b Less: direct expenses	9b					
	c Net income or (loss) from gaming activities						
	10a Gross sales of inventory, less returns and allowances	10a					
	b Less: cost of goods sold	10b					
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue		**Business Code**					
	11a						
	b						
	c						
	d All other revenue						
	e **Total.** Add lines 11a-11d						
	12 **Total revenue.** See instructions			41,477,790.	32365844.	0.	140,695.

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Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	1,227,309.	1,036,830.	182,992.	7,487.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	20,375,557.	17,206,280.	3,036,383.	132,894.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	778,954.	657,736.	116,070.	5,148.
9 Other employee benefits	1,423,587.	1,202,229.	212,157.	9,201.
10 Payroll taxes	1,870,882.	1,579,990.	278,822.	12,070.
11 Fees for services (nonemployees):				
a Management				
b Legal	48,414.		48,414.	
c Accounting	96,650.		96,650.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	16,264.		16,264.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	969,882.	803,569.	166,313.	
12 Advertising and promotion	393,081.	331,928.	58,575.	2,578.
13 Office expenses	658,293.	555,917.	98,103.	4,273.
14 Information technology	855,087.	722,072.	127,424.	5,591.
15 Royalties				
16 Occupancy	6,320,591.	5,336,516.	941,738.	42,337.
17 Travel	122,972.	103,841.	18,325.	806.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	972,074.	820,917.	144,868.	6,289.
23 Insurance	350,541.	295,998.	52,235.	2,308.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a STUDENT SERVICES	1,824,258.	1,687,965.	130,611.	5,682.
b FOOD SERVICES	1,113,011.	1,113,011.		
c REPAIRS & MAINTENANCE	707,437.	597,208.	105,390.	4,839.
d CLASSROOM SUPPLIES	452,098.	452,098.		
e All other expenses	579,864.	495,940.	78,558.	5,366.
25 **Total functional expenses.** Add lines 1 through 24e	41,156,806.	35,000,045.	5,909,892.	246,869.
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720)				

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Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X ☐

			(A) Beginning of year		(B) End of year
Assets	1	Cash - non-interest-bearing	3,713,175.	1	6,399,385.
	2	Savings and temporary cash investments	335,580.	2	994,784.
	3	Pledges and grants receivable, net	2,261,438.	3	2,374,217.
	4	Accounts receivable, net		4	
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	633,547.	9	553,407.
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — 10a: 6,276,025.			
	b	Less: accumulated depreciation — 10b: 3,214,110.	3,110,554.	10c	3,061,915.
	11	Investments - publicly traded securities	4,333,688.	11	4,161,275.
	12	Investments - other securities. See Part IV, line 11		12	
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets. See Part IV, line 11	1,308,388.	15	122,251,481.
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)	15,696,370.	16	139,796,464.
Liabilities	17	Accounts payable and accrued expenses	1,772,126.	17	1,848,220.
	18	Grants payable		18	
	19	Deferred revenue	207,090.	19	369,610.
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Sched		21	
	22	Loans and other payables to any current or former officer ctor, trustee, key employee, creator or founder, substantial c ntributo or 35% controlled entity or family member of any of these per ns		22	
	23	Secured mortgages and notes payable to unrelated third p ies		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	4,309,140.	25	124,538,418.
	26	**Total liabilities.** Add lines 17 through 25	6,288,356.	26	126,756,248.
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here** ☒ **and complete lines 27, 28, 32, and 33.**			
	27	Net assets without donor restrictions	8,883,014.	27	13,040,216.
	28	Net assets with donor restrictions	525,000.	28	0.
		Organizations that do not follow FASB ASC 958, check here ☐ **and complete lines 29 through 33.**			
	29	Capital stock or trust principal, or current funds		29	
	30	Paid-in or capital surplus, or land, building, or equipment fund		30	
	31	Retained earnings, endowment, accumulated income, or other funds		31	
	32	Total net assets or fund balances	9,408,014.	32	13,040,216.
	33	Total liabilities and net assets/fund balances	15,696,370.	33	139,796,464.

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Form **990** (2022)

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI X

1	Total revenue (must equal Part VIII, column (A), line 12)	1	41,477,790.
2	Total expenses (must equal Part IX, column (A), line 25)	2	41,156,806.
3	Revenue less expenses. Subtract line 2 from line 1	3	320,984.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	9,408,014.
5	Net unrealized gains (losses) on investments	5	63,839.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	3,247,379.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	13,040,216.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII X

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		X
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	X	
	If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	X	
	If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	3a	X	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	3b	X	

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SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 ☒ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in junction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, d state of the college or university: _____
10 ☐ An organization that normally receives (1) more than 33 1/3% of its support fro cont butions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no re than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from usinesses quired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
11 ☐ An organization organized and operated exclusively to test for public safety. e **section 509(a)(4).**
12 ☐ An organization organized and operated exclusively for the benefi of, perfo the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 50 (a)(1) s tion 509(a)(2)**. See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organ a on and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised ntrolle y its supported organization(s), typically by giving the supported organization(s) the power to regularly a point or ect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections and B.**
b ☐ **Type II.** A supporting organization supervised or controlle in c nnection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
f Enter the number of supported organizations .....
g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

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Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)) ..... 14 %

15 Public support percentage from 2021 Schedule A, Part II, line 14 ..... 15 %

16a **33 1/3% support test - 2022.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

b **33 1/3% support test - 2021.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

17a **10% -facts-and-circumstances test - 2022.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

b **10% -facts-and-circumstances test - 2021.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐

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Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 **Total.** Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 **Public support.** (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2022** (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from **2021** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2022.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

b **33 1/3% support tests - 2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

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Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* **Part VI** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* **Part VI** *when and how the organization made the determination.*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* **Part VI** *what controls the organization put in place to ensure su use.*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported org tion")? *If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make ants to the foreign supported organization? *If "Yes," describe in* **Part VI** *how the organization had such ntro and discretion despite being controlled or supervised by or in connection with its supported organizatio*	4b		
c	Did the organization support any foreign supported organization that does not ve an IRS termination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* **Part VI** *what c trols h ganization used to ensure that all support to the foreign supported organization was used exclusive or section 170(c)(2)(B) purposes.*	4c		
5a	Did the organization add, substitute, or remove any supported organ ations du g the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* **Par VI** *including (i) the names and EIN numbers of the supported organizations added, substituted, or d; (ii) e reasons for each such action; (iii) the authority under the organization's organizing documen authorizi such action; and (iv) how the action was accomplished (such as by amendment to the organizing cument)*	5a		
b	**Type I or Type II only.** Was any added or substituted supported ga zation part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* **Part VI.**	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990).*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? *If "Yes," complete Part I of Schedule L (Form 990).*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* **Part VI.**	9a		
b	Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* **Part VI.**	9b		
c	Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* **Part VI.**	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)*	10b		

DRAFT

Part IV Supporting Organizations *(continued)*

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?	**11a**		
b	A family member of a person described on line 11a above?	**11b**		
c	A 35% controlled entity of a person described on line 11a or 11b above? *If "Yes" to line 11a, 11b, or 11c, provide detail in* **Part VI.**	**11c**		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? *If "No," describe in* **Part VI** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.*	**1**		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* **Part VI** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.*	**2**		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a m ority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describ n* **Pa VI** *how control or management of the supporting organization was vested in the same persons that cont led or managed the supported organization(s).*	**1**		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by he l t day the fifth month of the organization's tax year, (i) a written notice describing the type and amount o sup ort provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the of notification, and (iii) copies of the organization's governing documents in effect on the date of notif ion, to e extent not previously provided?	**1**		
2	Were any of the organization's officers, directors, or trustees ther (i) ap ointed or elected by the supported organization(s) or (ii) serving on the governing body of a supp ted orga zation? *If "No," explain in* **Part VI** *how the organization maintained a close and continuous working relati h with the supported organization(s).*	**2**		
3	By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* **Part VI** *the role the organization's supported organizations played in this regard.*	**3**		

Section E. Type III Functionally Integrated Supporting Organizations

1 *Check the box next to the method that the organization used to satisfy the Integral Part Test during the year* **(see instructions).**

- **a** ☐ The organization satisfied the Activities Test. *Complete* **line 2** *below.*
- **b** ☐ The organization is the parent of each of its supported organizations. *Complete* **line 3** *below.*
- **c** ☐ The organization supported a governmental entity. *Describe in* **Part VI** *how you supported a governmental entity (see instructions).*

			Yes	No
2	Activities Test. **Answer lines 2a and 2b below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* **Part VI identify those supported organizations and explain** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.*	**2a**		
b	Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* **Part VI** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.*	**2b**		
3	Parent of Supported Organizations. **Answer lines 3a and 3b below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No" provide details in* **Part VI.**	**3a**		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? *If "Yes," describe in* **Part VI** *the role played by the organization in this regard.*	**3b**		

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Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in* **Part VI**). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	**1**		
2 Recoveries of prior-year distributions	**2**		
3 Other gross income (see instructions)	**3**		
4 Add lines 1 through 3.	**4**		
5 Depreciation and depletion	**5**		
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	**6**		
7 Other expenses (see instructions)	**7**		
8 **Adjusted Net Income** (subtract lines 5, 6, and 7 from line 4)	**8**		

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):			
a Average monthly value of securities	**1a**		
b Average monthly cash balances	**1b**		
c Fair market value of other non-exempt-use assets	**1**		
d **Total** (add lines 1a, 1b, and 1c)	**d**		
e **Discount** claimed for blockage or other factors (*explain in detail in* **Part VI**):			
2 Acquisition indebtedness applicable to non-exempt-use assets			
3 Subtract line 2 from line 1d.	**3**		
4 Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater am un see instructions).	**4**		
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	**5**		
6 Multiply line 5 by 0.035.	**6**		
7 Recoveries of prior-year distributions	**7**		
8 **Minimum Asset Amount** (add line 7 to line 6)	**8**		

Section C - Distributable Amount		Current Year
1 Adjusted net income for prior year (from Section A, line 8, column A)	**1**	
2 Enter 0.85 of line 1.	**2**	
3 Minimum asset amount for prior year (from Section B, line 8, column A)	**3**	
4 Enter greater of line 2 or line 3.	**4**	
5 Income tax imposed in prior year	**5**	
6 **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	**6**	

7 ☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

DRAFT

Part V **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** *(continued)*

Section D - Distributions			**Current Year**
1	Amounts paid to supported organizations to accomplish exempt purposes	**1**	
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	**2**	
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	**3**	
4	Amounts paid to acquire exempt-use assets	**4**	
5	Qualified set-aside amounts (prior IRS approval required - *provide details in* **Part VI**)	**5**	
6	Other distributions (*describe in* **Part VI**). See instructions.	**6**	
7	**Total annual distributions.** Add lines 1 through 6.	**7**	
8	Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions.	**8**	
9	Distributable amount for 2022 from Section C, line 6	**9**	
10	Line 8 amount divided by line 9 amount	**10**	

Section E - Distribution Allocations (see instructions)		**(i) Excess Distributions**	**(ii) Underdistributions Pre-2022**	**(iii) Distributable Amount for 2022**
1	Distributable amount for 2022 from Section C, line 6			
2	Underdistributions, if any, for years prior to 2022 (reasonable cause required - *explain in* **Part VI**). See instructions.			
3	Excess distributions carryover, if any, to 2022			
a	From 2017			
b	From 2018			
c	From 2019			
d	From 2020			
e	From 2021			
f	**Total** of lines 3a through 3e			
g	Applied to underdistributions of prior years			
h	Applied to 2022 distributable amount			
i	Carryover from 2017 not applied (see instructions)			
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4	Distributions for 2022 from Section D, line 7: $			
a	Applied to underdistributions of prior years			
b	Applied to 2022 distributable amount			
c	Remainder. Subtract lines 4a and 4b from line 4.			
5	Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in* **Part VI.** See instructions.			
6	Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions.			
7	**Excess distributions carryover to 2023.** Add lines 3j and 4c.			
8	Breakdown of line 7:			
a	Excess from 2018			
b	Excess from 2019			
c	Excess from 2020			
d	Excess from 2021			
e	Excess from 2022			

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Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

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Schedule B
(Form 990)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

Attach to Form 990 or Form 990-PF.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☒ 501(c)(3) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year ..... $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERTSON FOUNDATION [redacted]	$ 750,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
2	50 CAN, INC. [redacted]	$ 420,046.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
3	TIGER FOUNDATION [redacted]	$ 100,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
4	MAVERICK CAPITAL FOUNDATION [redacted]	$ 75,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
5	WILLIAM E. SIMON FOUNDATION [redacted]	$ 50,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
6	CHARLES PAYNE [redacted]	$ 20,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

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Name of organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	JACOB ELGHANAYAN [redacted]	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
8	CATHERINE DOUGLAS [redacted]	$ 7,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
9	JOSEPH KEVIN MURPHY [redacted]	$ 5,004.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
10	ELIZABETH MAHER [redacted]	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
11	RAQUEL ZAKI [redacted]	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
12	KATHRYN HELENIAK [redacted]	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

DRAFT

Name of organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

DRAFT

Name of organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this info. once.) $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer o gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate value of contributions to (during year)		
3	Aggregate value of grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (for example, recreation or education) ☐ Pre tion of a historically important land area
☐ Protection of natural habitat ☐ Preservati of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contr tion the form of a conservation easement on the last day of the tax year.

		Held at the End of the Tax Year
a Total number of conservation easements	2a	
b Total acreage restricted by conservation easements	2b	
c Number of conservation easements on a certified historic structure included in (a)	2c	
d Number of conservation easements included in (c) acquired after July 2 ,20 6, and ot on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, ex uished, or terminated by the organization during the tax year _____

4 Number of states where property subject to conservation eas ment is cated _____

5 Does the organization have a written policy regarding the pe dic moni ring, inspection, handling of violations, and enforcement of the conservation easements it ho ? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 $ _____

(ii) Assets included in Form 990, Part X $ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 $ _____

b Assets included in Form 990, Part X $ _____

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Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange program
e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

		Amount
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodi ount liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on t XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on For 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) T o years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end bal nce (line g, column (a)) held as:

a Board designated or quasi-endowment _____%
b Permanent endowment _____%
c Term endowment _____%

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

		Yes	No
(i) Unrelated organizations	3a(i)		
(ii) Related organizations	3a(ii)		
b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?	3b		

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		2,928,674.	1,168,772.	1,759,902.
d Equipment		2,232,125.	1,477,642.	754,483.
e Other		1,115,226.	567,696.	547,530.
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10c.)*				3,061,915.

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Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)		

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Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) RIGHT OF USE ASSET - OPERATING LEASE	120,012,568.
(2) RIGHT OF USE ASSET - FINANCE LEASE	1,890,724.
(3) SECURITY DEPOSITS	328,428.
(4) DUE FROM FREINDS OF CCS	19,761.
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 15.)*	122,251,481.

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) OPERATING LEASE LIABILITY	122,623,822.
(3) FINANCE LEASE LIABILITY	1,914,596.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 25.)*	124,538,418.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... X

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	44,772,744.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a	63,839.		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d	3,247,379.		
e	Add lines **2a** through **2d**			2e	3,311,218.
3	Subtract line **2e** from line **1**			3	41,461,526.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	16,264.		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	16,264.
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	41,477,790.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	41,140,542.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0.
3	Subtract line **2e** from line **1**			3	41,140,542.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	16,264.		
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	16,264.
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	41,156,806.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

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PART X, LINE 2:

THE SCHOOL RECOGNIZES THE EFFECT OF INCOME TAX POSITIONS ONLY IF THOSE POSITIONS ARE MORE LIKELY THAN NOT TO BE SUSTAINED. MANAGEMENT HAS DETERMINED THAT THE SCHOOL HAD NO UNCERTAIN TAX POSITIONS THAT WOULD REQUIRE FINANCIAL STATEMENT RECOGNITION OR DISCLOSURE. THE SCHOOL IS NO LONGER SUBJECT TO EXAMINATIONS BY THE APPLICABLE TAXING JURISDICTIONS FOR YEARS PRIOR TO JUNE 30, 2020.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

GAIN ON TRANSFER OF LEASE TO RELATED PARTY 3,247,379.

Part XIII Supplemental Information *(continued)*

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SCHEDULE E
(Form 990)

Department of the Treasury
Internal Revenue Service

Schools

Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I

			YES	NO
1	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	1	X	
2	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	2	X	
3	Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its tax year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II	3	X	
	AS A PUBLIC SCHOOL SUBJECT TO OPEN ENROLLMENT, THE CHARTER SCHOOL IS NOT SUBJECT TO SPECIFIC GUIDELINES SET FORTH IN REV. PROC. 75-50 AND AS MODIFIED BY REV. PROC. 2020-23.			
4	Does the organization maintain the following?			
a	Records indicating the racial composition of the student body, faculty, and administrati staff?	4a	X	
b	Records documenting that scholarships and other financial assistance are awa ded on a rac ly nondiscriminatory basis?	4b		X
c	Copies of all catalogues, brochures, announcements, and other written commu catio the public dealing with student admissions, programs, and scholarships?	4c	X	
d	Copies of all material used by the organization or on its behalf to solicit on bution ?	4d	X	
	If you answered "No" to any of the above, please explain. If you need more a use Part II.			
	THE SCHOOL IS FREE TO ALL STUDENTS, IT DID NOT AND DOES NOT OFFER SCHOLARSHIPS OR OTHER FINANCIAL ASSISTANCE.			
5	Does the organization discriminate by race in any way with respe to			
a	Students' rights or privileges?	5a		X
b	Admissions policies?	5b		X
c	Employment of faculty or administrative staff?	5c		X
d	Scholarships or other financial assistance?	5d		X
e	Educational policies?	5e		X
f	Use of facilities?	5f		X
g	Athletic programs?	5g		X
h	Other extracurricular activities?	5h		X
	If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.			
6a	Does the organization receive any financial aid or assistance from a governmental agency?	6a	X	
b	Has the organization's right to such aid ever been revoked or suspended?	6b		X
	If you answered "Yes" on either line 6a or line 6b, explain on Part II.			
7	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, as modified by Rev. Proc. 2019-22, 2019-22 I.R.B. 1260, covering racial nondiscrimination? If "No," explain on Part II	7	X	

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Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information. See instructions.

LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL RECEIVES PER-PUPIL FUNDING FROM THE NYC BOARD OF EDUCATION UNDER THEIR CHARTER AGREEMENT. THE SCHOOL ALSO RECEIVED VARIOUS FEDERAL, STATE AND CITY FUNDS INCLUDING FEDERAL ENTITLEMENTS TO ASSIST WITH COVERING THE COST OF CERTAIN PROGRAMS.

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SCHEDULE J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.			
	☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
	☐ Travel for companions	☐ Payments for business use of personal residence		
	☐ Tax indemnification and gross-up payments	☐ Health or social club dues or initiation fees		
	☐ Discretionary spending account	☐ Personal services (such as maid, chauffeur, chef)		
b	If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	1b		
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on li 1a?	2		
3	Indicate which, if any, of the following the organization used to establish the compensation of the o nization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods use by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.			
	☐ Compensation committee	☐ Written employme contract		
	☐ Independent compensation consultant	☒ Compens ion survey study		
	☒ Form 990 of other organizations	☒ Approval the b or compensation committee		
4	During the year, did any person listed on Form 990, Part VII, Section A, l e with spect to the filing organization or a related organization:			
a	Receive a severance payment or change-of-control payment?	4a		X
b	Participate in or receive payment from a supplemental nonqualifi tireme plan?	4b		X
c	Participate in or receive payment from an equity-based compe sation ar ngement?	4c		X
	If "Yes" to any of lines 4a-c, list the persons and provide the licable a ounts for each item in Part III.			
	Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a	The organization?	5a		X
b	Any related organization?	5b		X
	If "Yes" on line 5a or 5b, describe in Part III.			
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a	The organization?	6a		X
b	Any related organization?	6b		X
	If "Yes" on line 6a or 6b, describe in Part III.			
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III	7	X	
8	Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	8		X
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9		

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Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) LESTER LONG	(i)	333,849.	43,000.	2,248.	15,200.	8,034.	402,331.	0.
EXECUTIVE DIRECTOR	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) JACQUELINE DAVIS	(i)	202,644.	0.	815.	10,432.	18,805.	232,696.	0.
DIRECTOR OF CURRICULUM & INSTRUCTION	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) REBECCA SCOGNAMIGLIO	(i)	205,674.	0.	825.	10,643.	6,082.	223,224.	0.
SCHOOL DIRECTOR	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) ERIN LINNEHAN	(i)	143,096.	0.	687.	7,345.	22,915.	174,043.	0.
SCHOOL DIRECTOR	(ii)	0.	0.	0.	0.	0.	0.	0.
(5) PAUL TRYON	(i)	146,198.	0.	681.	6,607.	7,605.	161,091.	0.
SCHOOL DIRECTOR	(ii)	0.	0.	0.	0.	0.	0.	0.
(6) CHRISTOPHER EMMERSON-PACE	(i)	140,698.	0.	1,059.	7,140.	8,425.	157,322.	0.
INSTRUCTIONAL COACH	(ii)	0.	0.	0.	0.	0.	0.	0.
(7) VIVIAN CASSABERRY-FURBY	(i)	139,084.	0.	2,305.	7,087.	7,770.	156,246.	0.
DIRECTOR OF BUSINESS	(ii)	0.	0.	0.	0.	0.	0.	0.
(8) LEAH EPSTEIN	(i)	137,513.	0.	670.	7,071.	9,563.	154,817.	0.
DIRECTOR OF SPECIAL SERVICES	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

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Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 7:

THE ORGANIZATION PAID THE EXECUTIVE DIRECTOR A PERFORMANCE-BASED BOARD APPROVED BONUS IN 2022.

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SCHEDULE M (Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

Part I Types of Property

		(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications	X		86,944.	COST
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded				
10	Securities - Closely held stock				
11	Securities - Partnership, LLC, or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation contribution - Historic structures				
14	Qualified conservation contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other ( )				
26	Other ( )				
27	Other ( )				
28	Other ( )				

DRAFT

29	Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement	29	0

			Yes	No
30a	During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?	30a		X
b	If "Yes," describe the arrangement in Part II.			
31	Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	31		X
32a	Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	32a		X
b	If "Yes," describe in Part II.			
33	If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.			

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

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SCHEDULE O (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-[redacted]

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

CLASSICAL CHARTER SCHOOLS

Employer identification number

[redacted]

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

PROFICIENCY IN AND ADVANCED MASTERY OF NEW YORK STATE PERFORMANCE STANDARDS.

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

THE FORM 990 IS REVIEWED BY THE CONTROLLER AND BUSINESS DIRECTOR. THE FORM 990 IS THEN REVIEWED BY THE FINANCE COMMITTEE OF THE BOARD OF TRUSTEES. UPON THEIR APPROVAL, THE RETURN IS PROVIDED TO THE FULL BOARD FOR REVIEW PRIOR TO FILING WITH THE INTERNAL REVENUE SERVICE.

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

THE SCHOOL HAS A CONFLICT OF INTEREST POLICY APPLICABLE TO TRUSTEES, OFFICERS, AND KEY PERSONS. SUCH PERSONS HAVE A DUTY TO PROMPTLY DISCLOSE TO THE BOARD ANY POTENTIAL CONFLICTS OF INTEREST AND ALL MATERIAL FACTS. DETERMINATIONS REGARDING CONFLICT MATTERS ARE TO BE MADE BY THE BOARD OF TRUSTEES BY MAJORITY VOTE. ANY TRUSTEE, OFFICER, OR KEY PERSON INVOLVED IN SUCH MATTER MUST LEAVE THE ROOM IN WHICH DELIBERATIONS ARE CONDUCTED AND MAY NOT VOTE, ACT OR ATTEMPT TO INFLUENCE IMPROPERLY THE DELIBERATIONS ON SUCH MATTER. THE EXISTENCE AND RESOLUTION OF ANY REPORTED CONFLICTS OF INTEREST ARE DOCUMENTED IN THE BOARD MINUTES.

UPON ELECTION OR APPOINTMENT, AND ON AN ANNUAL BASIS THEREAFTER, TRUSTEES, OFFICERS, AND KEY PERSONS MUST COMPLETE A CONFLICT OF INTEREST DISCLOSURE FORM AND MUST SIGN A STATEMENT, WHICH AFFIRMS THAT SUCH PERSON HAS RECEIVED A COPY OF THE CONFLICT OF INTEREST POLICY, HAS READ AND UNDERSTANDS THE POLICY, AND HAS AGREED TO COMPLY WITH THE POLICY. THE WRITTEN DISCLOSURE

DRAFT

Name of the organization
CLASSICAL CHARTER SCHOOLS

Employer identification number
[redacted]

STATEMENTS ARE SUBMITTED TO AND REVIEWED BY THE SECRETARY OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 15:

THE COMPENSATION OF THE EXECUTIVE DIRECTOR AND OTHER OFFICERS OF THE ORGANIZATION WAS DETERMINED AND APPROVED BY THE BOARD OF TRUSTEES. SALARY SURVEYS BENCHMARKING SIMILARLY SITUATED SCHOOLS AND COMPARABLE POSITIONS WERE UTILIZED IN THE PROCESS. THE PROCESS WAS LAST CONDUCTED IN 2023 AND WAS DOCUMENTED IN THE BOARD MINUTES.

FORM 990, PART VI, SECTION C, LINE 19:

THE SCHOOL MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

GAIN ON TRANSFER OF LEASE TO RELATED PARTY 3,247,379.

FORM 990, PART XII, LINE 2C:

THE SCHOOL HAS A FINANCE COMMITTEE THAT IS RESPONSIBLE FOR THE OVERSIGHT OF THE AUDIT OF ITS FINANCIAL STATEMENTS AND THE SELECTION OF AN INDEPENDENT ACCOUNTANT. THIS PROCESS HAS NOT CHANGED FROM THE PRIOR YEAR.

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