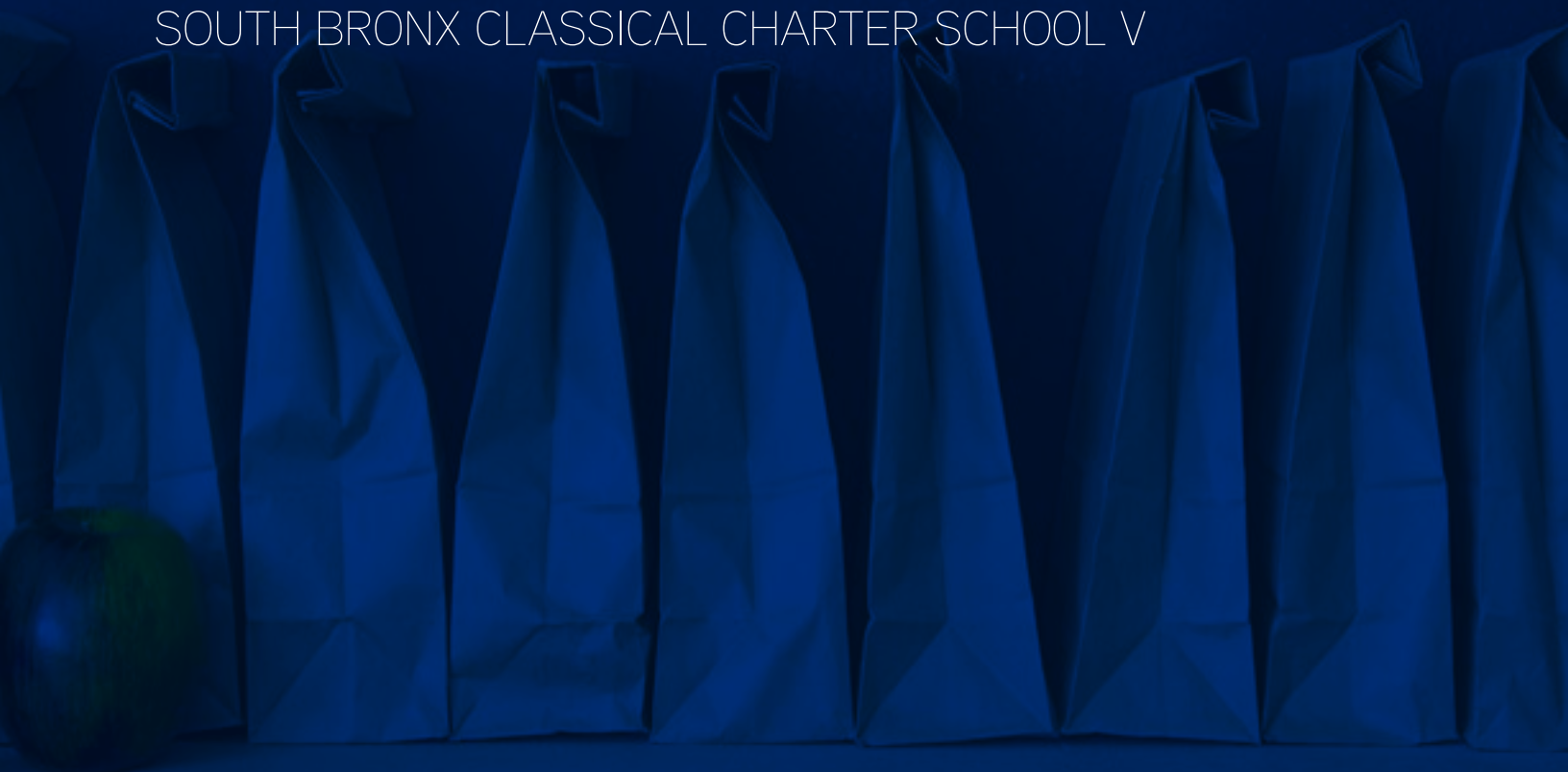




SUMMARY OF FINDINGS AND RECOMMENDATIONS

PROPOSAL TO ESTABLISH
SOUTH BRONX CLASSICAL CHARTER SCHOOL V



EXECUTIVE SUMMARY

The applicants submitted the proposal to authorize South Bronx Classical Charter School V (“South Bronx Classical V”) to the SUNY Charter Schools Institute (the “Institute”) on February 8, 2024, in response to the Institute’s [2024 Request for Proposals \(the “RFP”\)](#), released on behalf of the SUNY Trustees on December 6, 2023. The Institute makes copies of applications [available on its website](#).

South Bronx Classical V will open in August 2025 with 120 students in Kindergarten – 1st grades, will add students in elementary grades each year, and ultimately serve 360 students in Kindergarten – 5th grades in New York City Community School District (“CSD”) 8, 10, or 11 during its first charter term. South Bronx Classical V will fill all seats that become available due to attrition in Kindergarten – 5th grades. The school will replicate the highly effective instructional program implemented at South Bronx Classical Charter School (“South Bronx Classical I”), South Bronx Classical Charter School II (“South Bronx Classical II”), South Bronx Classical Charter School III (“South Bronx Classical III”) and South Bronx Classical Charter School IV (“South Bronx Classical IV”), all of which are authorized by the New York State Board of Regents (“Board of Regents”). As applicable, information regarding the renewal history, academic performance, and student discipline for the existing schools is presented in Appendix B.

After a thorough review process consistent with the New York Charter Schools Act of 1998 (as amended, the “Act”), the Institute finds that the proposal to establish South Bronx Classical V rigorously demonstrates the criteria detailed in the Institute’s 2024 RFP, which align with the Act.

Based on the proposal, as amended by the applicant, and the foregoing:

The Institute recommends that the SUNY Trustees approve the proposal to establish South Bronx Classical Charter School V.

TABLE OF CONTENTS

FINDINGS

| 2

PREFERENCE SCORING

| 10

BACKGROUND & DESCRIPTION

| 3

CONCLUSION & RECOMMENDATIONS

| 10

NOTIFICATION & PUBLIC COMMENTS

| 9

APPENDIX A

Summary of Public Comments Received

APPENDIX B

Existing School Performance

APPENDIX C

Fiscal Dashboard

FINDINGS

Based on the comprehensive review of the proposal and interviews of the applicant and the education corporation board of trustees, the Institute makes the following findings.

1. The charter school described in the proposal meets the requirements of the Act and other applicable laws, rules, and regulations as reflected in (among other things):
 - the inclusion of appropriate policies and procedures for the provision of services and programs for students with disabilities and English language learners (“ELLs”);
 - the required policies for addressing the issues related to student discipline, personnel matters, and health services;
 - an admissions policy that complies with the Act and federal law;
 - the inclusion of the by-laws for the operation of the education corporation’s board of trustees; and,
 - the inclusion of an analysis of the projected fiscal and programmatic impact of the schools on surrounding public and private schools.
2. The applicant has demonstrated the ability to operate the school in an educationally and fiscally sound manner as reflected in (among other things):
 - an educational program that meets or exceeds the state performance standards;
 - a culture of self-evaluation and accountability at both the administrative and board level;
 - the student achievement goals articulated by the applicant;
 - appropriate rosters of educational personnel;
 - a sound mission statement;
 - a comprehensive assessment plan;
 - sound start-up, first-year, and five-year budget plans;
 - a plan to acquire comprehensive general liability insurance to include any vehicles, employees, and property;
 - evidence of adequate community support for, and interest in, the charter school sufficient to allow the school to reach anticipated enrollment;
 - descriptions of programmatic and independent fiscal audits, with fiscal audits occurring at least annually;
 - school calendar and school day schedule that provide at least as much instruction time during the school year as required of other public schools; and,
 - methods and strategies for serving students with disabilities in compliance with federal laws and regulations.
3. Granting the proposal is likely to: a) have a significant educational benefit to the students expected to attend the proposed charter school; b) improve student learning and achievement; and, c) materially further the purposes of the Act. This finding is supported by (among other things):
 - a robust and proven academic program with excellent student outcomes;
 - a classical education framework focusing on both character education and high academic expectations including instruction in Latin;
 - a rigorous assessment system that allows leaders and teachers to provide targeted support to each student;

- a board possessing a blend of critical areas of expertise as well as demonstrated ability to oversee startup and replication of effective schools; and,
 - an effective personnel model with clear lines of responsibility, and opportunities for professional development and growth.
4. The proposed charter school would meet or exceed enrollment and retention targets, as prescribed by the SUNY Trustees, of students with disabilities, ELLs, and students who are eligible applicants for the federal Free and Reduced Price Lunch (“FRPL”) program as required by Education Law § 2852(9-a)(b)(i).
 5. The applicant has conducted public outreach for the school, in conformity with a thorough and meaningful public review process prescribed by the SUNY Trustees, to solicit community input regarding the proposed charter school and to address comments received from the impacted community concerning the educational and programmatic needs of students in conformity with Education Law § 2852(9-a)(b)(ii).
 6. The Institute has determined that the proposal rigorously demonstrates the criteria and best satisfies the objectives contained within the RFP, and, therefore, is a “qualified application” within the meaning of Education Law § 2852(9-a)(d) that should be submitted to the New York State Board of Regents (the “Board of Regents”) for approval.

The Institute developed the RFP “in a manner that facilitate[d] a thoughtful review of charter school applications, consider[ed] the demand for charter schools by the community, and s[ought] to locate charter schools in a region or regions where there may be a lack of alternatives and access to charter schools would provide new alternatives within the local public education system that would offer the greatest educational benefit to students,” in accordance with Education Law § 2852(9-a)(b). The Institute also posted the draft RFP for public comment and responded to same.

The Institute conducted a rigorous evaluation of the proposal under consideration including academic and fiscal soundness, and legal reviews. In addition, the Institute engaged independent consultants to evaluate the proposal based on the criteria set forth in the RFP. Pursuant to its protocols, the Institute conducted an interview with the founding team, including the applicant, the proposed board of trustees, and key South Bronx Classical V leadership. Trustee Joseph Belluck, Chairman of the SUNY Trustees’ Charter Schools Committee, also met with the founding team.

Amendments to the Act in 2015 restricted the total number of charter schools the SUNY Trustees and the Board of Regents may approve to open in New York City. Currently, nine charters remain available to be granted in New York City by the SUNY Trustees or the Board of Regents.

BACKGROUND & DESCRIPTION

The applicants proposing to open South Bronx Classical V currently operate four highly effective schools in the Bronx. South Bronx Classical I opened in August 2006 and currently serves 511 students in Kindergarten – 8th grades. It operates in public space in CSD 12. South Bronx Classical II opened in August 2013 and currently serves 299 students in Kindergarten – 8th grades. It operates in public space in CSD 7. South Bronx Classical III opened in August 2015 and currently serves 493 students in Kindergarten – 8th grades. It operates in private space in CSD 9. South Bronx Classical IV opened in August 2017 and currently serves 380 students in Kindergarten – 8th grades. It operates in private space in CSD 7.

South Bronx Classical I, II, III, and IV have demonstrated the capacity to achieve strong student outcomes, with overall combined proficiency rates across its schools of 90% on ELA and 98% in math on the 2022-23 state exams. In addition to strong academic results, the schools enact a Classical education program integrating character education, Latin, debate, and a rich array of clubs and activities including sports, music, arts, and yoga.

South Bronx Classical V will also benefit from a shared services team of approximately 20 staff who provide support in the areas of curriculum development, student services, operations and finance, talent and human resources, and data management.

The applicants seek to open South Bronx Classical V based on the existing schools' track record of success and significant community need and demand given the limited number of high-performing schools in the proposed CSDs.

MISSION, PHILOSOPHY, AND KEY DESIGN ELEMENTS

The South Bronx Classical V mission states:

South Bronx Classical Charter School V will prepare Kindergarten – 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.

South Bronx Classical V will implement the following key design elements:

- **Classical Framework:** Within a classical framework, South Bronx Classical V will provide an educational program based on two principles: First, that all children can achieve academic success when given a rigorous and organized curriculum, effective teaching, and a structured environment; and second, that development of respectful, compassionate, productive citizens is a fundamental aim of education.
- **Rigorous and Organized Curriculum:** South Bronx Classical V will support students to achieve academically through a demanding, research-based, field-tested curriculum. All students 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:** South Bronx Classical V will recruit teachers primarily from its ClassiCorps Fellowship program. Teacher development is prioritized, with 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. South Bronx Classical V will create positive student behavior through modeling, explicit behavioral instruction, and a transparent set of expectations shared with families. The school's Code of Conduct includes recognition of its core values and clear consequences for infractions.
- **Development of Respectful, Compassionate, and Productive Citizens:** South Bronx Classical V's founding team believes that development of respectful, compassionate, and productive citizens is a fundamental purpose of education. All students at the school will have 45 minutes of character education per week.
- **Family Engagement:** South Bronx Classical V will regularly communicate with families regarding their students' academic and behavioral progress, using grades and test scores as benchmarks for discussion. The school will also have a Family Advisory Council which will serve as a liaison between parents and administration.

CALENDAR AND SCHEDULE

South Bronx Classical V will offer 193 days of instruction each year. The first day of instruction for the 2025 school year will be on or around August 20, 2025, and the last day will be on or around June 26, 2026. Subsequent school years will follow a similar calendar. The school day will begin each morning at 8:00 A.M. and end at 4:45 P.M. South Bronx Classical V will provide students with more than 1,447 hours of instruction per year, which exceeds the requirements of 900 instructional hours for 1st – 6th grades mandated by Education Law § 2851(2)(n) and 8 NYCRR § 175.5.

ACADEMIC PROGRAM

South Bronx Classical V will implement the proven academic program currently in place at the South Bronx Classical I, II, III, and IV. The standards-based curriculum centers on daily writing, reading, mathematics, and science instruction, with a focus on developing strong literacy and numeracy skills as well as essential knowledge of history and science. In the spirit of the Classical education design, the academic program also includes instruction in Latin, debate, and character education, as well as ample opportunities to participate in extracurricular clubs and activities such as arts, music, and sports.

Through this academic program, the existing four schools have already achieved strong student outcomes, with proficiency rates of 90% on ELA and 98% in math on the 2022-23 state exams.

English Language Arts (“ELA”) (Reading and Writing)

Students at South Bronx Classical V will engage in over three hours of daily ELA instruction, which include instructional blocks for phonics, grammar, writing, read aloud, guided reading, close reading, and textual analysis. The ELA curriculum is internally developed, drawing on proven, research-based sources such as Words Their Way for phonics, Teacher’s College Writing Workshop, and the Fountas and Pinnell (“F&P”) benchmark system to inform guided reading levels to ensure targeted and individualized supports. The extended time dedicated to ELA instruction, along with the varied components, allow an effective blend of whole-group instruction to focus on broad concepts and comprehension, with small-group and individualized coaching to address individual student skills.

Mathematics

South Bronx Classical V’s mathematics program is internally developed to align with and exceed state standards, with the ultimate goal of ensuring students leave 8th grade prepared to excel in algebra and other areas of high school and college mathematics. Daily math instruction, totaling over 100 minutes, includes a math block with whole group instruction focused on core math concepts, a number stories lesson in which students apply and share their own strategies to a realistic word problem, and number routines in which students discuss computational strategies and develop flexible numerical thinking.

Science

The school’s science curriculum is based on the Next Generation Science Standards, and features hands-on lessons that teach foundational concepts of physics, chemistry, and biology through experiments and observation. Lessons guide students to discover and implement the scientific method through repeating simple classic experiments, while recording and analyzing their own data to draw conclusions.

Social Studies

South Bronx Classical V’s history curriculum aims to develop critical thinking, emotional maturity and tolerance, and students’ capacity to respectfully, persuasively, and articulately express, debate, and defend opinions. Content is taught chronologically and across cultures, helping students understand the discoveries and genius of human societies from across the globe, including Ancient Egypt, Ancient Greece, Chinese dynasties, and African tribal cultures.

At-Risk

South Bronx Classical V will employ a robust Response to Intervention (“RTI”) program to identify and support struggling students. The school will employ a dedicated at-risk learning specialist who provides intervention supports and works closely with the school director to regularly review academic data to identify students who may need additional support and monitor progress for students already receiving additional interventions. Struggling students may receive a variety of supports such as additional small-group instruction or action plans for positive behavioral support. The school will offer Special Education Teacher Support Services (“SETSS”), as well as all related services to support students with identified disabilities. ELLs receive support through structured English language immersion, with additional support through individualized instruction or tutoring as needed.

Latin

Students at South Bronx Classical V begin formal Latin lessons in 3rd grade. 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.

Debate

Students at South Bronx Classical V start debate instruction in 4th grade. Lessons focus is on the history of debate, the basics of argument development, and best practices of public speaking. The debate program is designed to help students become 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.

Character Education

Character Education is taught in Kindergarten – 8th grades, once per week by a Dean of Students. The curriculum, which was written in-house, is based on Character Counts and the New York Social Emotional Learning (“SEL”) standards. Across all grades, Character Education is divided into six units of study that align with Classical’s six Character Pillars: Trustworthiness, Respect, Responsibility, Fairness, Caring, and Citizenship. Lessons involve scenario-based learning, often using multi-media or examples that are age-appropriate and relevant to the targeted grade level. For example, students may examine different circumstances in which a character does or does not demonstrate fairness to others and then are asked to explain why or why not, using content they have learned in the unit.

Fitness

Fitness instruction combines sports-specific skill practice, game play, gross-motor development, strength, and endurance training with health education. Units covered include locomotor movements, throwing and catching, soccer, basketball, tennis/badminton, flag football, floor hockey, European team handball, track and field, volleyball, kickball, and softball. Additionally, fitness at the middle school level covers important health topics including mental health and the dangers of alcohol, tobacco, and other drugs.

Music

South Bronx Classical V’s music curriculum teaches musical history, culture, and genres from around the world. Students study music theory as they learn to read and write their musical ideas, and learn to sing and play instruments to develop fine and gross motor skills and confidence.

EXISTING SCHOOL PERFORMANCE

Please see Appendix B for information about the academic performance of existing schools.

SCHOOL CULTURE AND DISCIPLINE

South Bronx Classical V's school culture is based on its mission to educate "liberated scholars of impeccable character" and its six character pillars of trustworthiness, respect, responsibility, fairness, caring, and citizenship. All students receive weekly lessons in Character Education, with lessons facilitated by deans of students based on the Character Counts curriculum and NYS Social Emotional Learning Standards. Lessons often involve scenario-based learning and are discourse-heavy to promote scholar voice and conversation with peers. The school will also host monthly Community Gatherings that highlight a Character Pillar of the month and celebrate students who have demonstrated those behaviors toward their peers and teachers. In addition to our curriculum dedicated to character development, teachers are encouraged to reinforce these pillars and celebrate behaviors across the school day.

ORGANIZATIONAL CAPACITY

The executive director, supervised by the board of trustees, provides strategic management and leadership to ensure the delivery of South Bronx Classical V's mission and key design elements, and also oversees the four existing schools. A school director will be the day-to-day leader of South Bronx Classical V, overseeing all teachers, coaches, and deans and ensuring effective delivery of the academic program and the daily operational health of the school. The school director reports directly to the executive director. The school's management structure also includes an operations manager, dean of students, grade team leaders, at risk learning specialists, and instructional coaches who collectively provide additional leadership in academics, operations, school culture, and at-risk programming.

South Bronx Classical V will also benefit from the shared services team, which provides additional support in the areas of curriculum development, operations and finance, talent and human resources, at risk programming, and data management. The shared services team focuses primarily on longer-term planning and operations so that school-based leaders can focus on day-to-day management of the schools.

GOVERNANCE

The by laws of South Bronx Classical V indicate that the education corporation board will consist of no fewer than 5 and no more than 13 voting members. The proposed members of the board of trustees are set forth below:

1. Jake Elghanayan, Board Chair

Jake Elghanayan is a principal at TF Cornerstone, a real estate development firm. Previously, Mr. Elghanayan practiced 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.

2. 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.

3. Mariel Jenkins, Treasurer

Mariel Jenkins 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.

4. Veena Malpani, Secretary

Veena Malpani 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.

5. 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.

6. 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.

7. Kevin Murphy, Trustee

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

8. 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.

FACILITIES

South Bronx Classical V plans to secure private facilities in the proposed CSDs. Two of the existing four schools operate in private space, and the founding team and board have experience identifying facilities, negotiating private lease agreements, and overseeing building and renovations as required. The school will also benefit from the support and capacity of two of the proposed board members who have extensive experience in New York City real estate. The proposed charter expects to engage in robust facility negotiations that will yield multiple suitable sites upon authorization. If viable private facilities are unavailable, the schools will explore other facilities options such as co-located public space.

FISCAL IMPACT

The fiscal impact of South Bronx Classical V on the district is summarized below.

Charter Year	A. Expected Number of Students	B. Basic Charter School Per Pupil Aid	C. Projected Per Pupil Revenue (AxB)	D. Other District Revenue (SPED, Food Service, Grants, etc.)	E. Total Project Funding from District to Charter School (C+D)	F. New York City School District Budget	G. Projected District Impact (E/F)
Year 1 (2025-26)	124	18,340	2,274,160	227,416	2,501,576	39,400,000,000	0.01%
Year 5 (2029-30)	372	18,340	6,822,480	682,248	7,504,728	39,400,000,000	0.02%

The Institute finds that the fiscal impact of the proposed school on the district, including charter, district, and nonpublic schools in the same geographical area will be minimal.

The Institute reviewed the school’s proposed startup and fiscal plans and supporting evidence for each year of the proposed charter term. The Institute finds the budgets and fiscal plans are sound and sufficient startup funds will be available to the new charter school.

The Institute analyzed the existing education corporation and finds it fiscally strong as the SUNY Fiscal Dashboard reflects.

NOTIFICATION & PUBLIC COMMENTS

The Institute notified the district as well as public and nonpublic schools in the same geographic area of the proposed school about receipt of the proposal, and posted a public notice on the Institute’s website for public review. The district scheduled a public hearing pertaining to the proposed school for May 13, 2024. The Institute carefully reviews and considers all district and public comments received prior to finalizing its recommendation. Any district comments and a summary of public comments is provided in Appendix A.

PREFERENCE SCORING

Education Law § 2852(9-a)(c) requires authorizers to establish a scoring rubric and grant priority to applications meeting both statutory and authorizer standards. The purpose of the preference criteria is to prioritize proposals in the event that the number of proposals meeting the SUNY Trustees' requirements exceeds the maximum number of charters to be issued. The RFP identified the minimum eligibility requirements and mandated preference criteria required by Education Law § 2852(9-a)(c), as described in greater detail below, as well as SUNY's additional criteria. The South Bronx Classical V proposal met the eligibility requirements, as evidenced by the following:

- the proposal was sufficiently complete, i.e., it included a Transmittal and Summary form, Proposal Summary, and responses to all RFP requests as prescribed by the Institute;
- the proposal included a viable plan to meet the enrollment and retention targets established by the SUNY Trustees for students with disabilities, ELLs, and students who are eligible to participate in the FRPL program (as detailed in Request 5); and,
- the proposal provided evidence of public outreach that conforms to the Act and the process prescribed by the SUNY Trustees for the purpose of soliciting and incorporating community input regarding the proposed charter school and its academic program (as detailed in Request 4).

As South Bronx Classical V's proposal submission met the eligibility criteria, the Institute's evaluation continued with a full review of the proposal, an interview of the application team and proposed board of trustees, and requests for clarification and/or amendments to the proposal. The review process then continued with an evaluation of the proposal in relation to the 9 Preference Criteria contained in the RFP for which proposals can earn credit as described in the RFP's Preference Scoring Guidance. The Preference Criteria, in addition to eligibility criteria and the overall high standards established by the SUNY Trustees, include the mandatory objectives set forth in Education Law §§ 2852(9-a)(c)(i)-(viii).

Pursuant to the RFP, in compliance with the requirements for new charter applications set forth in Education Law § 2852(9-a)(b)(i-ii), (g), the Institute recommends the SUNY Trustees approve the application for one new charter as proposed. South Bronx Classical Charter School V earned a score of 25.75 preference points out of a maximum of 39.

CONCLUSION & RECOMMENDATIONS

Based on its review and findings, the Institute recommends that the SUNY Trustees approve the proposal to establish South Bronx Classical Charter School V to open in August 2025 .

APPENDIX A:

SUMMARY OF PUBLIC COMMENTS RECEIVED

SUMMARY OF PUBLIC COMMENTS RECEIVED DURING THE SUNY PUBLIC COMMENT PERIOD THROUGH JULY 10, 2024

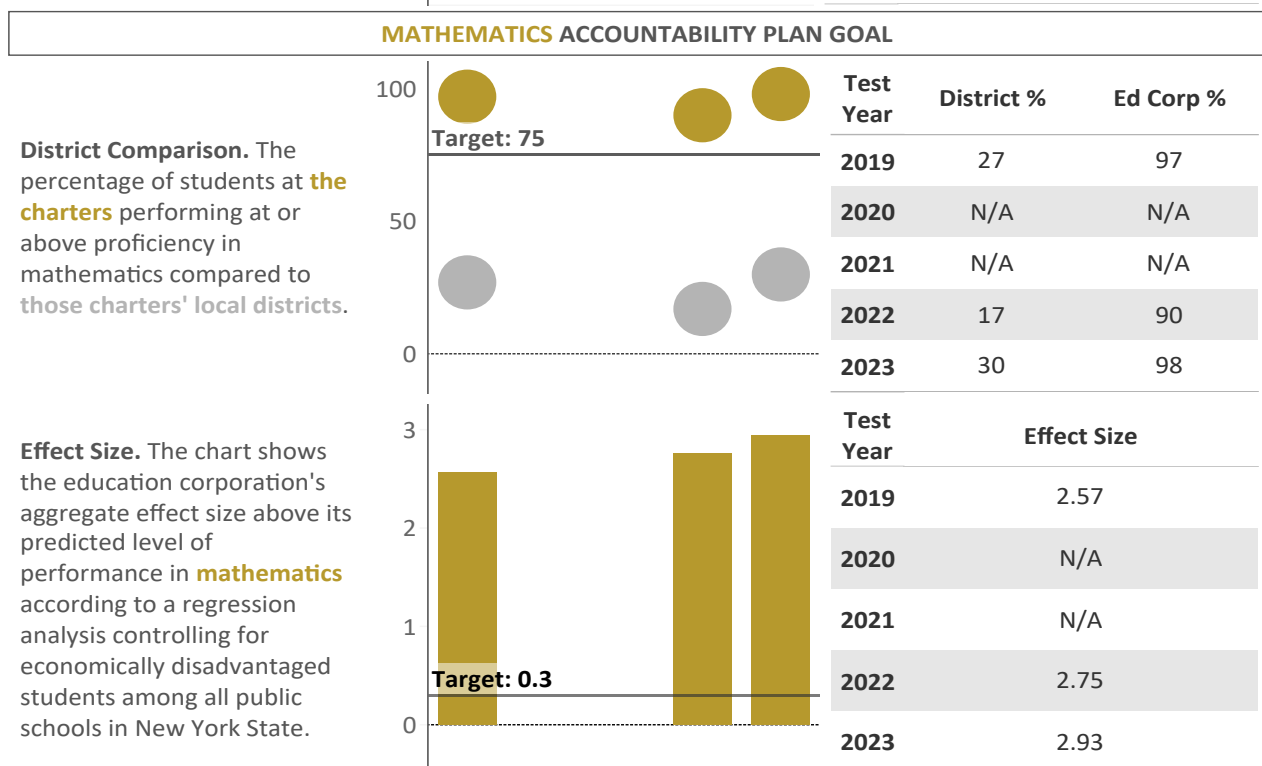
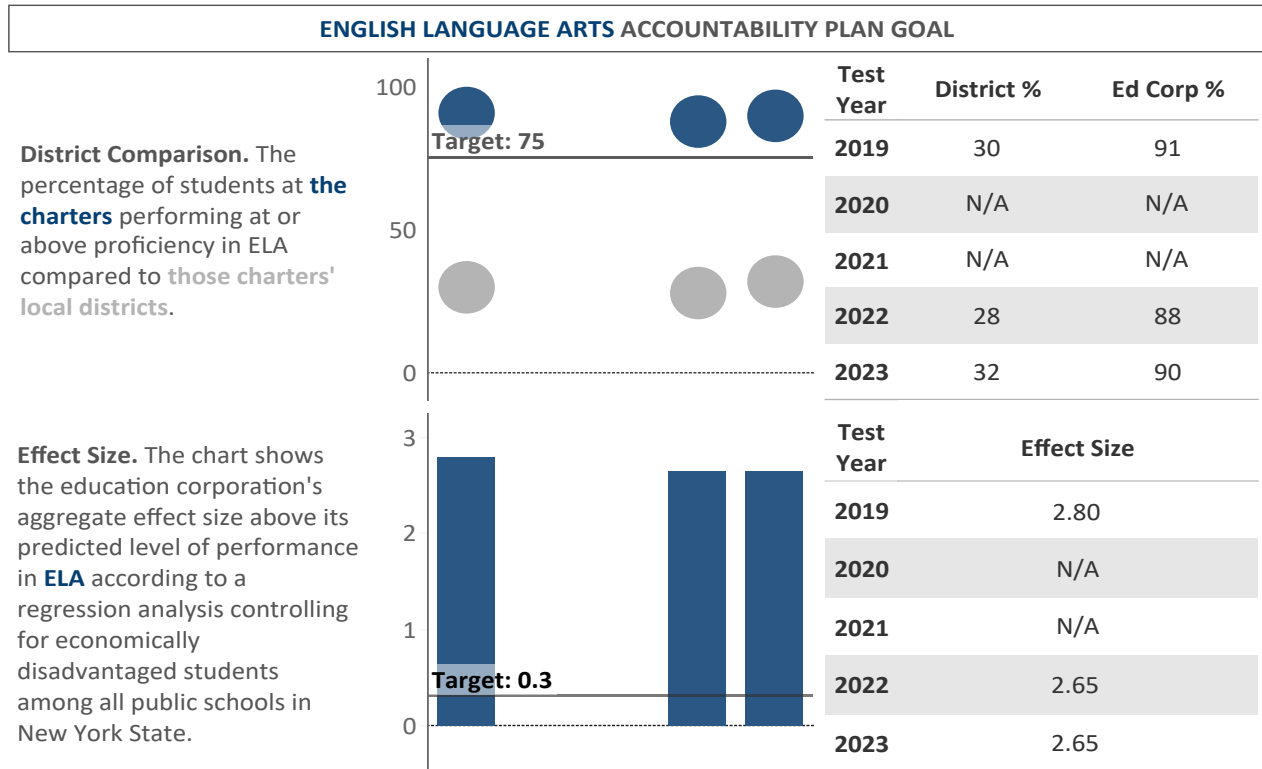
On or about March 7, 2024, in accordance with Education Law § 2857(1), the Institute notified the district as well as public and private schools in the same geographic area of the proposed school about receipt of the proposal to establish South Bronx Classical V. The notice reminded the district that the New York State Commissioner of Education's regulations require the school district to hold a public hearing within 30 days of the notice for each new charter application. A redacted copy of the South Bronx Classical V proposal was also posted on the [Institute's website](#) for public review.

The district scheduled a hearing pertaining to the proposed school for May 13, 2024 and provided the Institute a summary of comments made. The New York City Department of Education held its required hearing on South Bronx Classical Charter School V's new charter school application on May 13, 2024 by videoconference. Two network leaders spoke in support of the application. They presented how the network's schools have won four National Blue Ribbon Awards and how the pass rates in English language arts ("ELA") and math have improved at the schools over time. The network leaders stated the network is the highest performing charter network in New York City and across the state, based on its percentage of students who are proficient in math and ELA state exams, and has the highest performing special populations, including students with disabilities and English language learners, in the state, also based on state proficiencies percentages. Finally, they spoke about the network's strategic approach to growth and development by taking time between school openings and reflecting on the demand and desire in the community before opening a new school. No one spoke in opposition to the application.

The applicants provided additional evidence of support in the form of two letters from parents of students who currently attend South Bronx Classical Schools. The Institute has received no direct comments in opposition to the application.

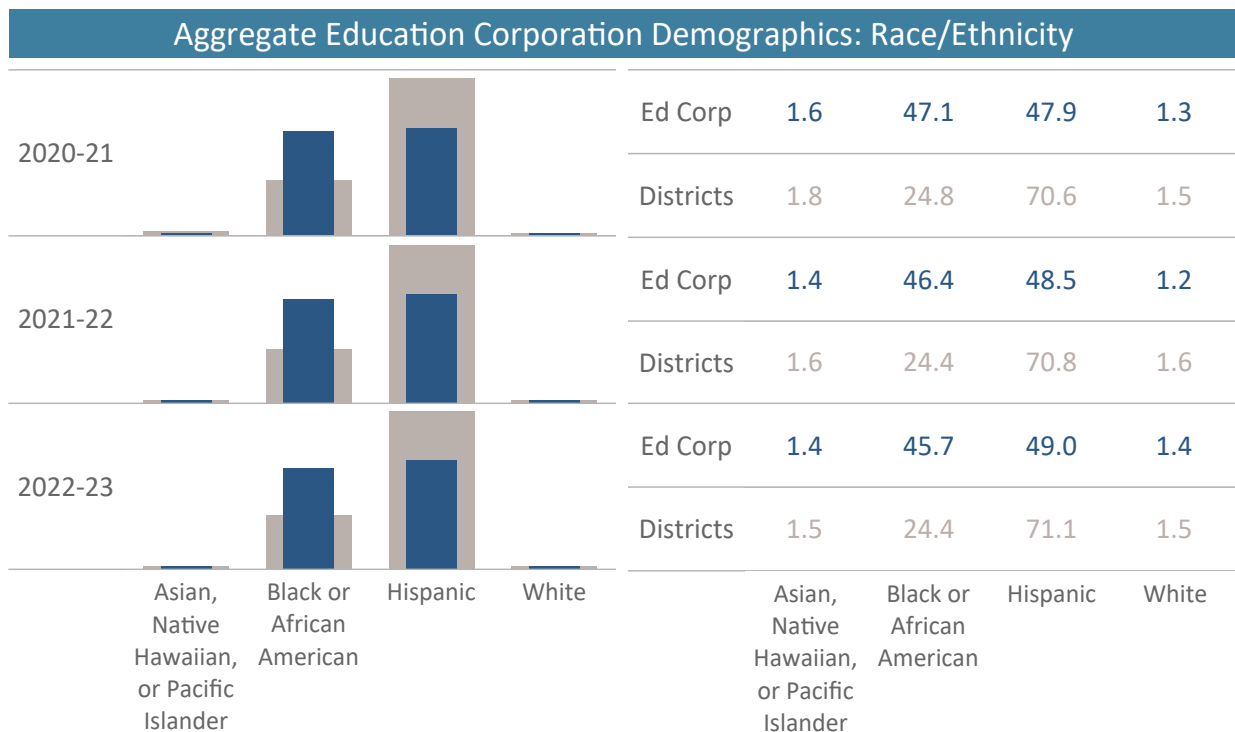
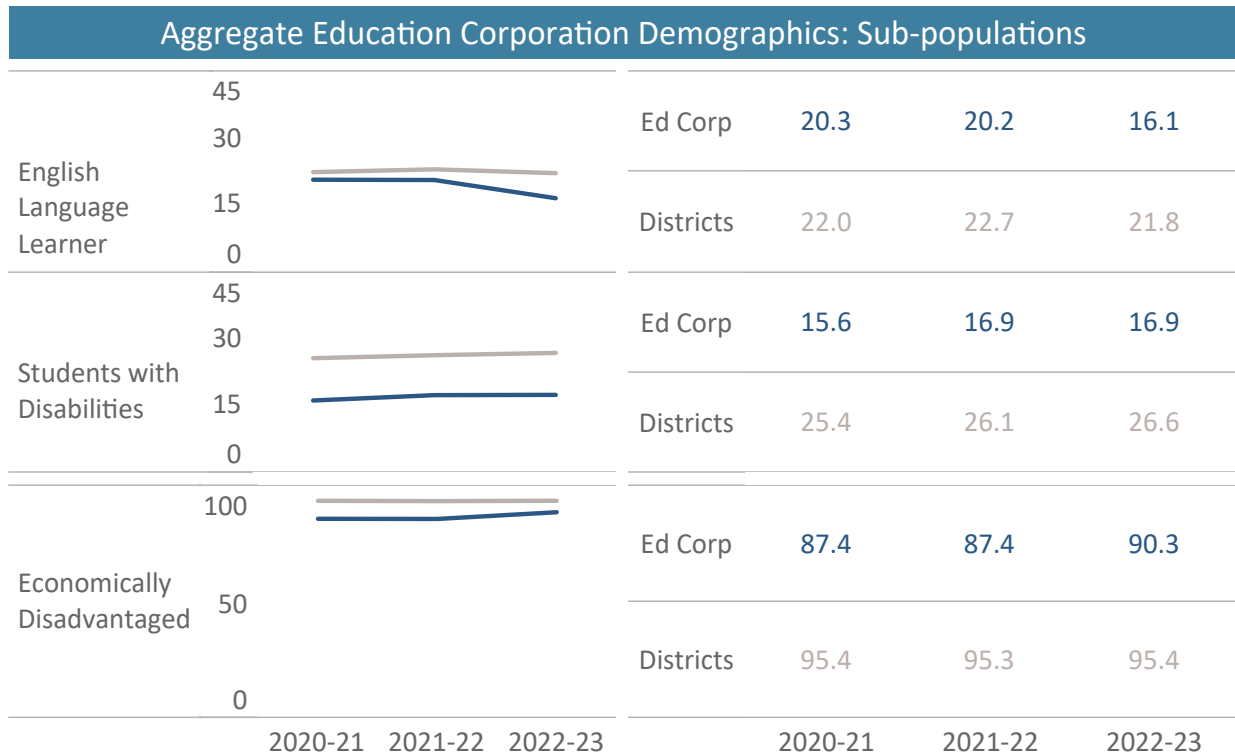
APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter Schools



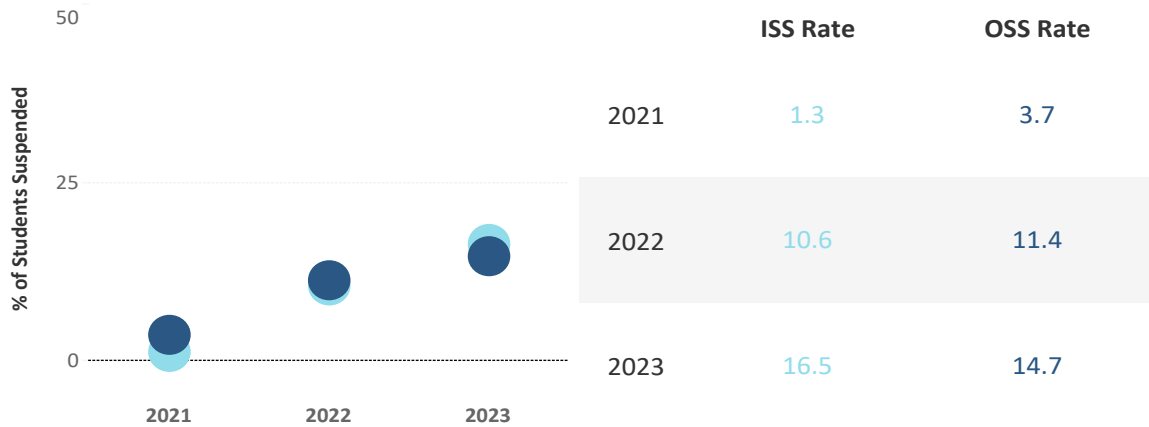
APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter Schools Aggregate Education Corporation Enrollment



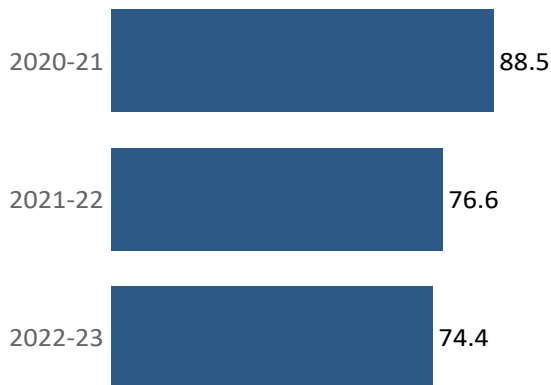
APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter Schools



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

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



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

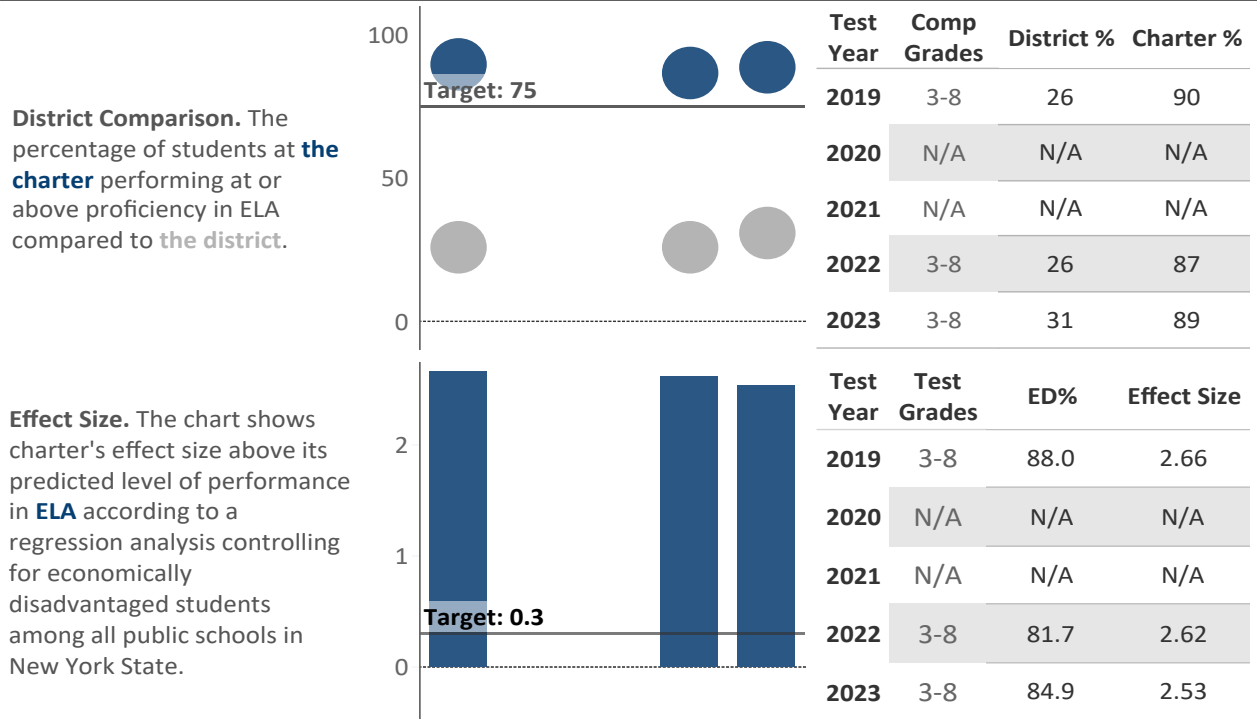
2021	2022	2023
0	0	0

APPENDIX B: EXISTING SCHOOL PERFORMANCE

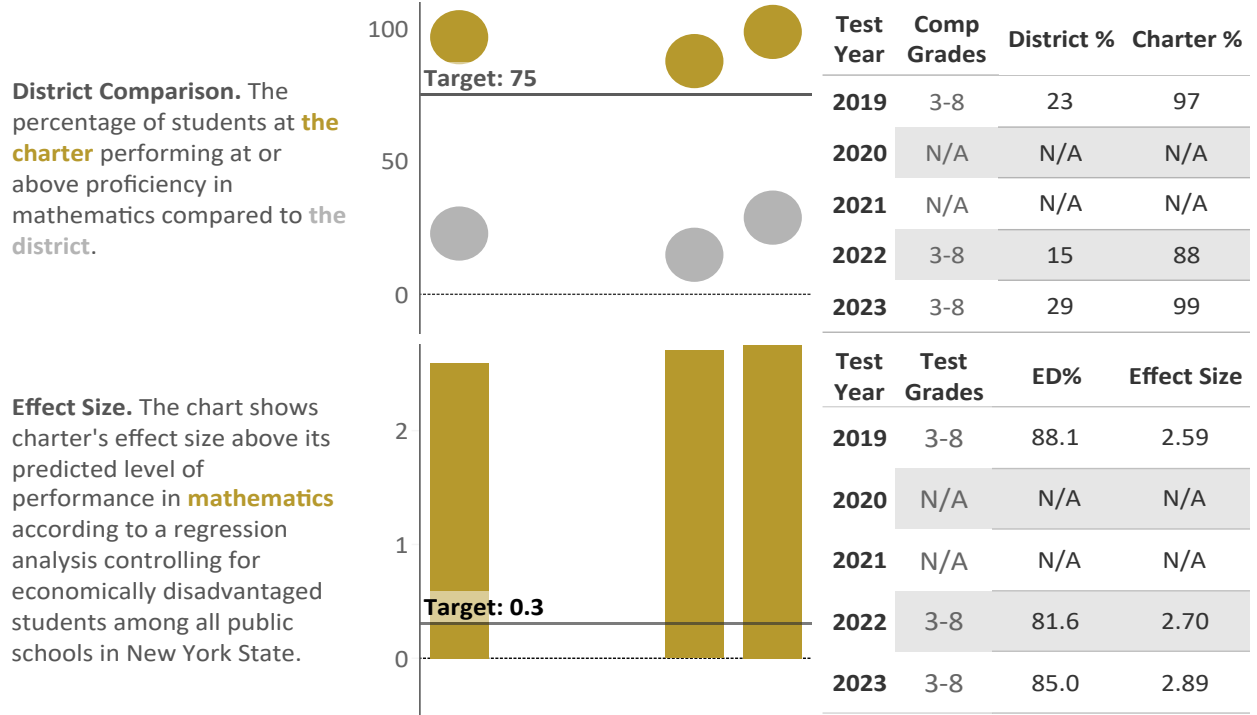
South Bronx Classical Charter School

Bronx CSD 12

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL



MATHEMATICS ACCOUNTABILITY PLAN GOAL

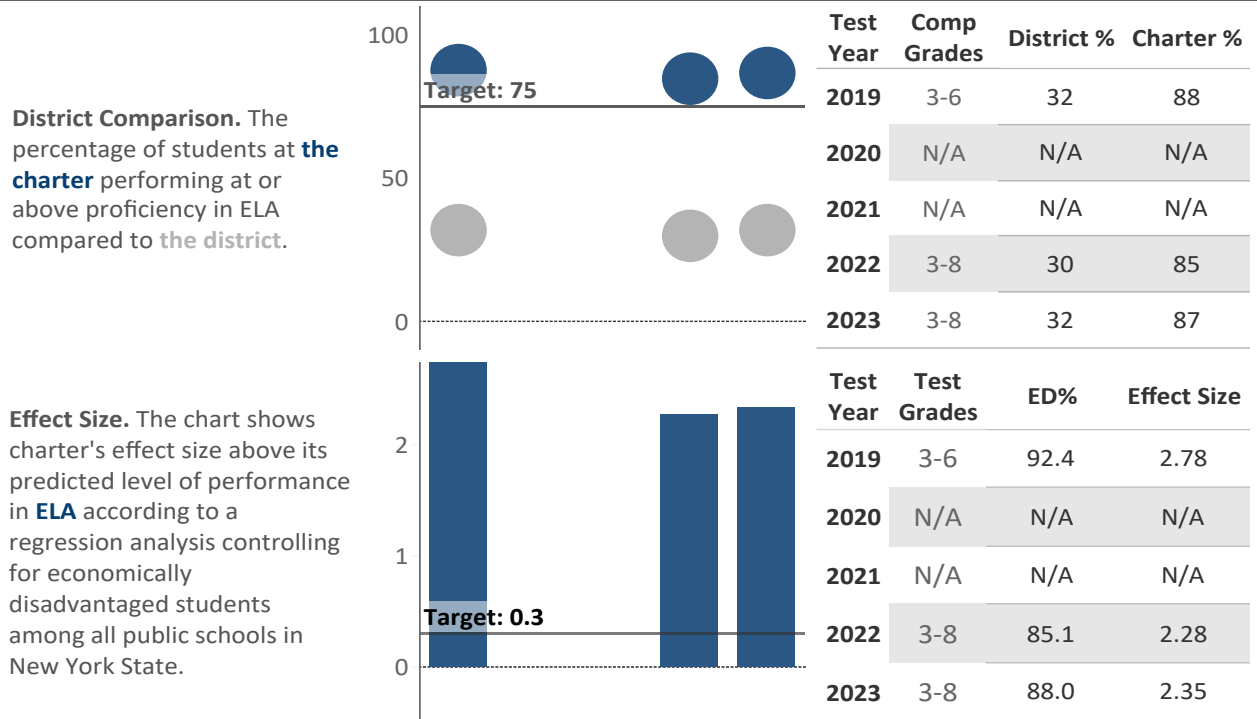


APPENDIX B: EXISTING SCHOOL PERFORMANCE

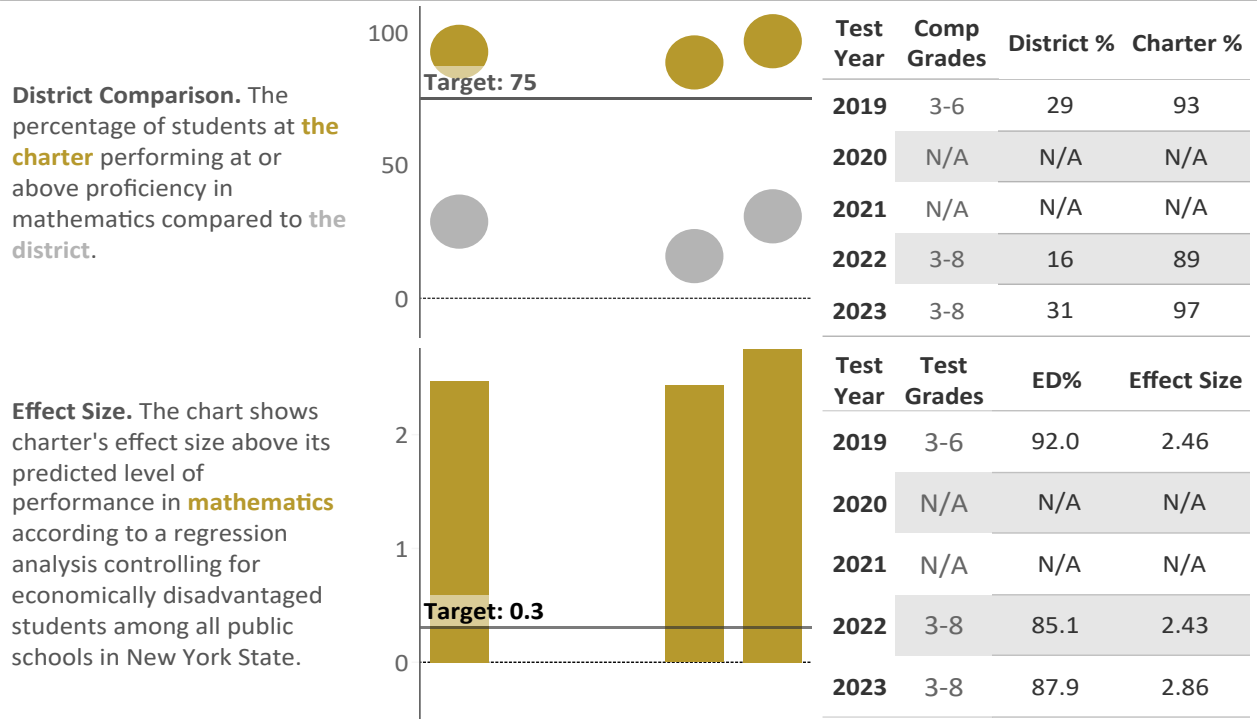
South Bronx Classical Charter School II

Bronx CSD 7

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL



MATHEMATICS ACCOUNTABILITY PLAN GOAL



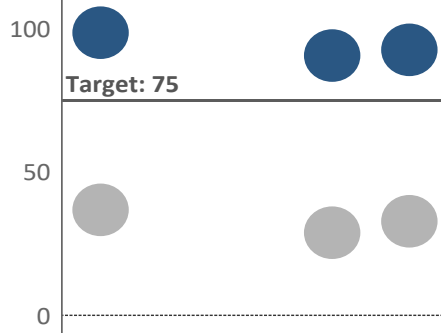
APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School III

Bronx CSD 9

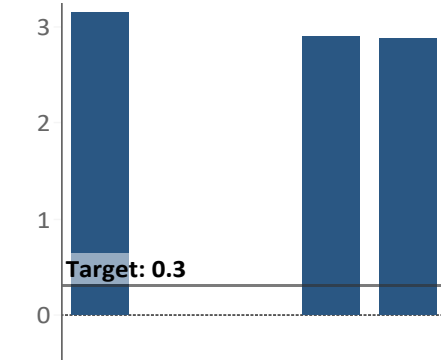
ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

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



Test Year	Comp Grades	District %	Charter %
2019	3-4	37	99
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-7	29	91
2023	3-8	33	93

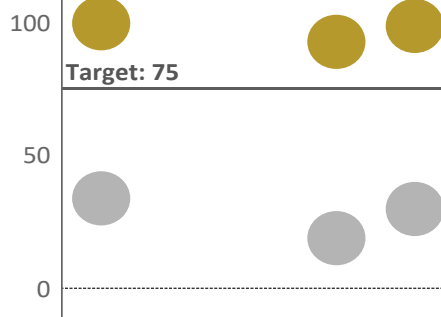
Effect Size. The chart shows charter's effect size above its predicted level of performance in **ELA** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.



Test Year	Test Grades	ED%	Effect Size
2019	3-4	81.4	3.15
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-7	92.8	2.90
2023	3-8	96.0	2.88

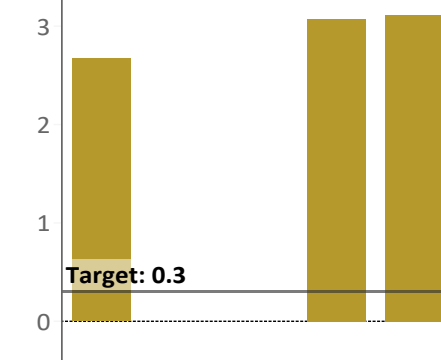
MATHEMATICS ACCOUNTABILITY PLAN GOAL

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



Test Year	Comp Grades	District %	Charter %
2019	3-4	34	100
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-7	19	93
2023	3-8	30	99

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



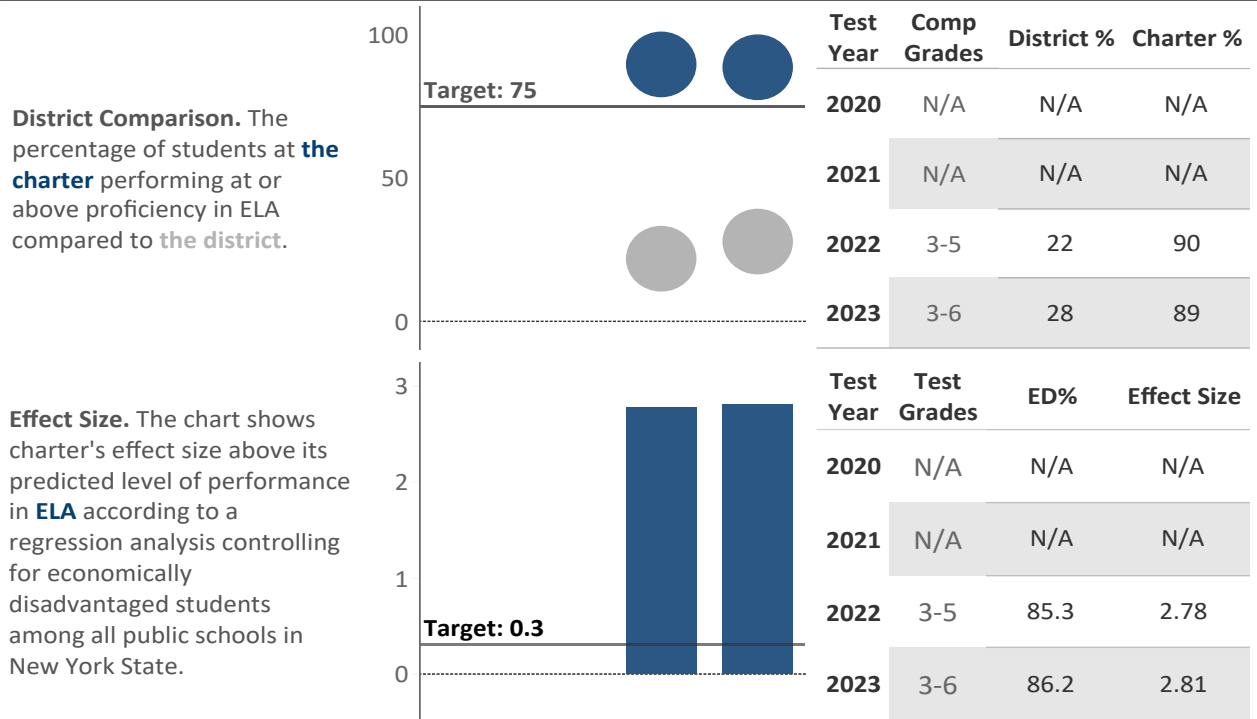
Test Year	Test Grades	ED%	Effect Size
2019	3-4	81.5	2.67
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-7	92.8	3.06
2023	3-8	96.0	3.11

APPENDIX B: EXISTING SCHOOL PERFORMANCE

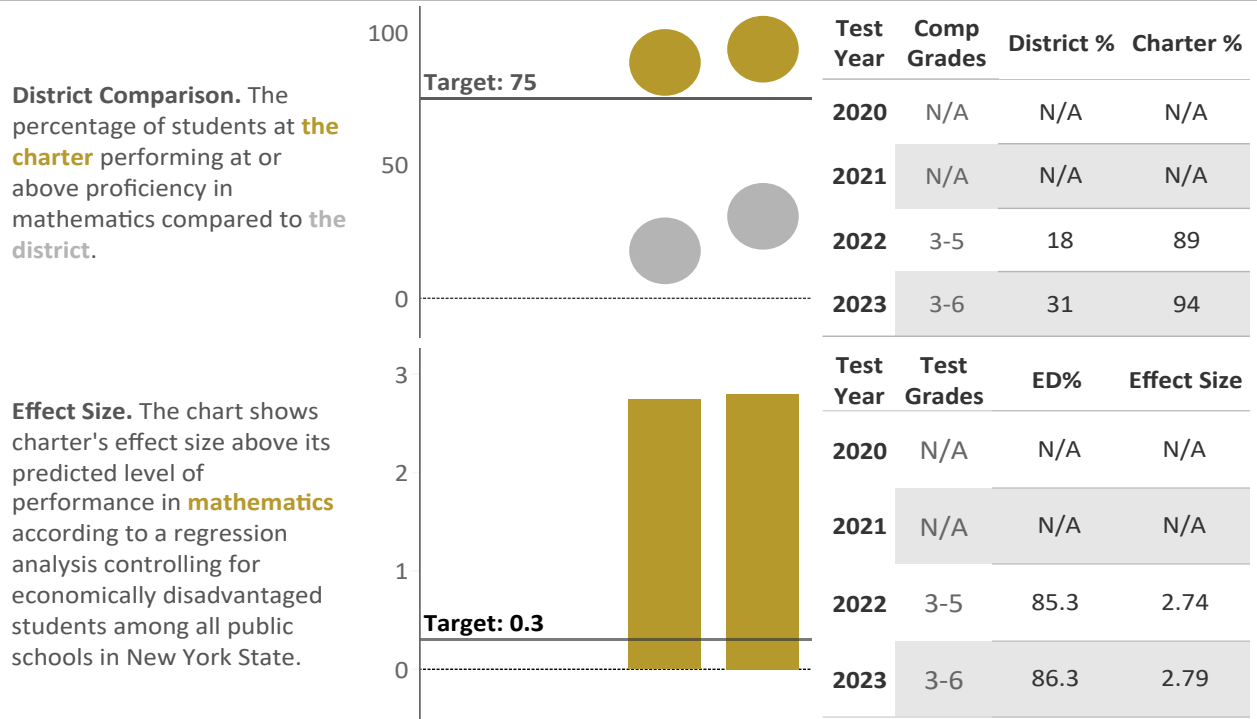
South Bronx Classical Charter School IV

Bronx CSD 7

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL



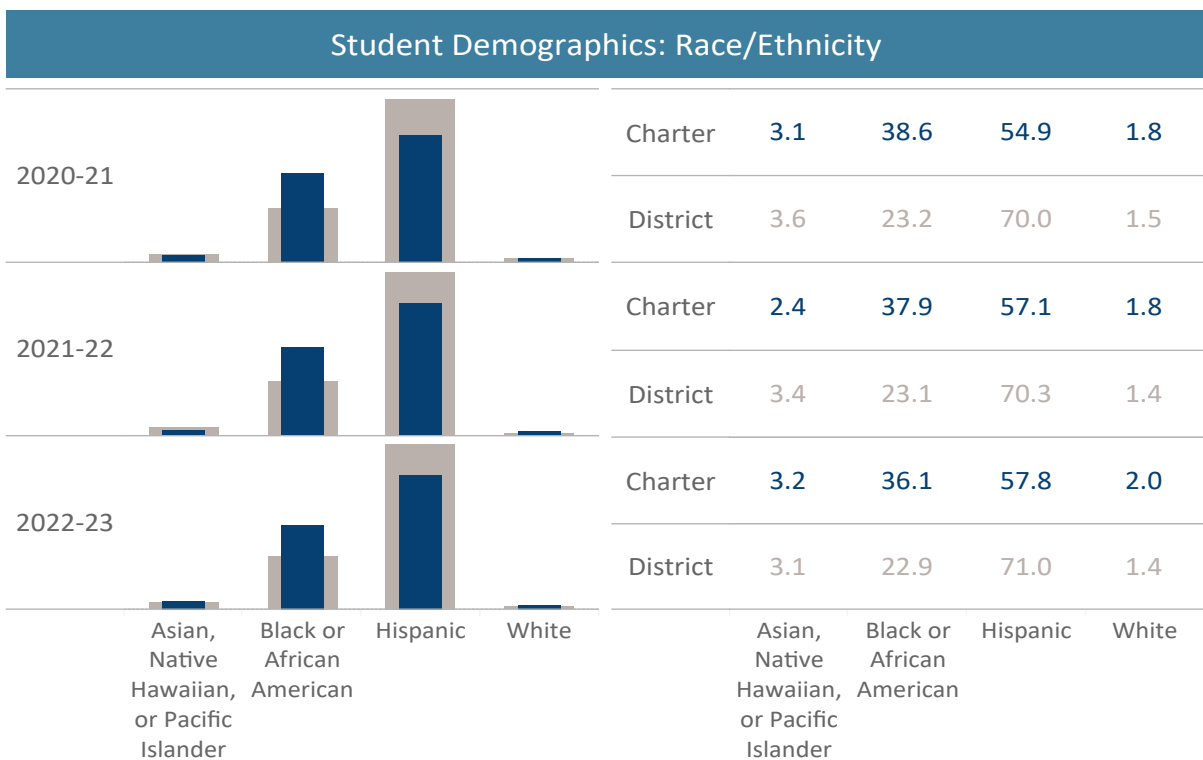
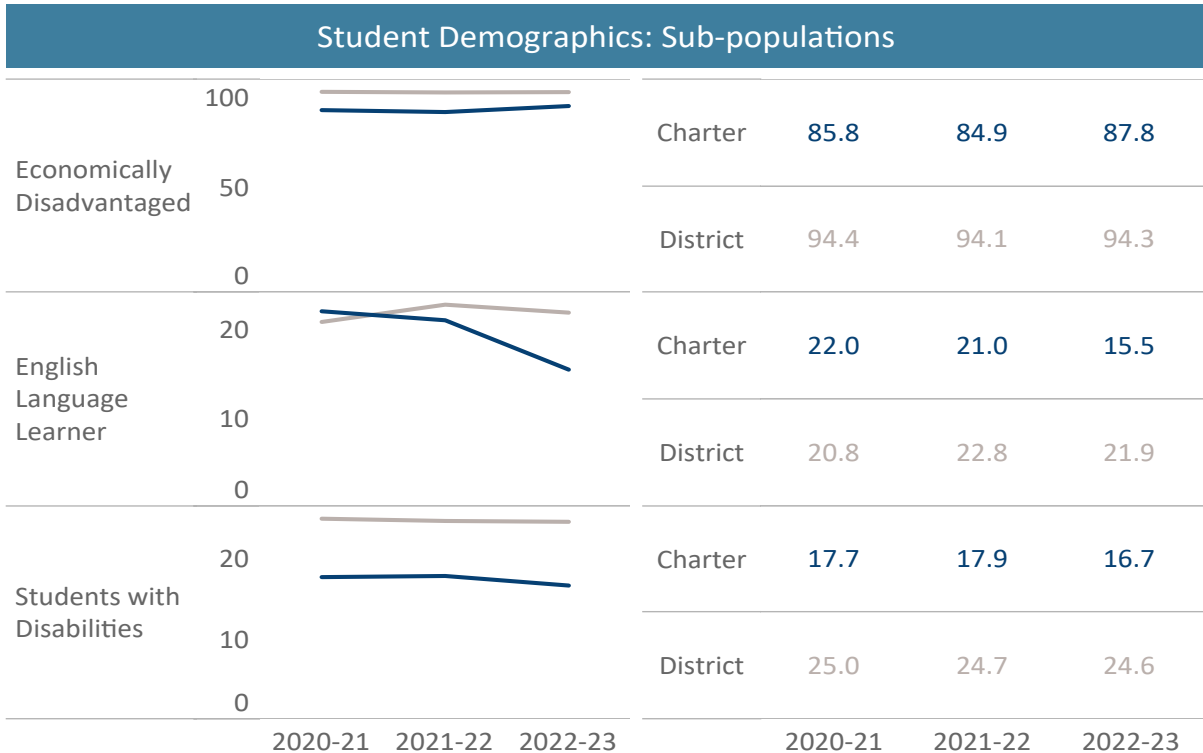
MATHEMATICS ACCOUNTABILITY PLAN GOAL



APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School

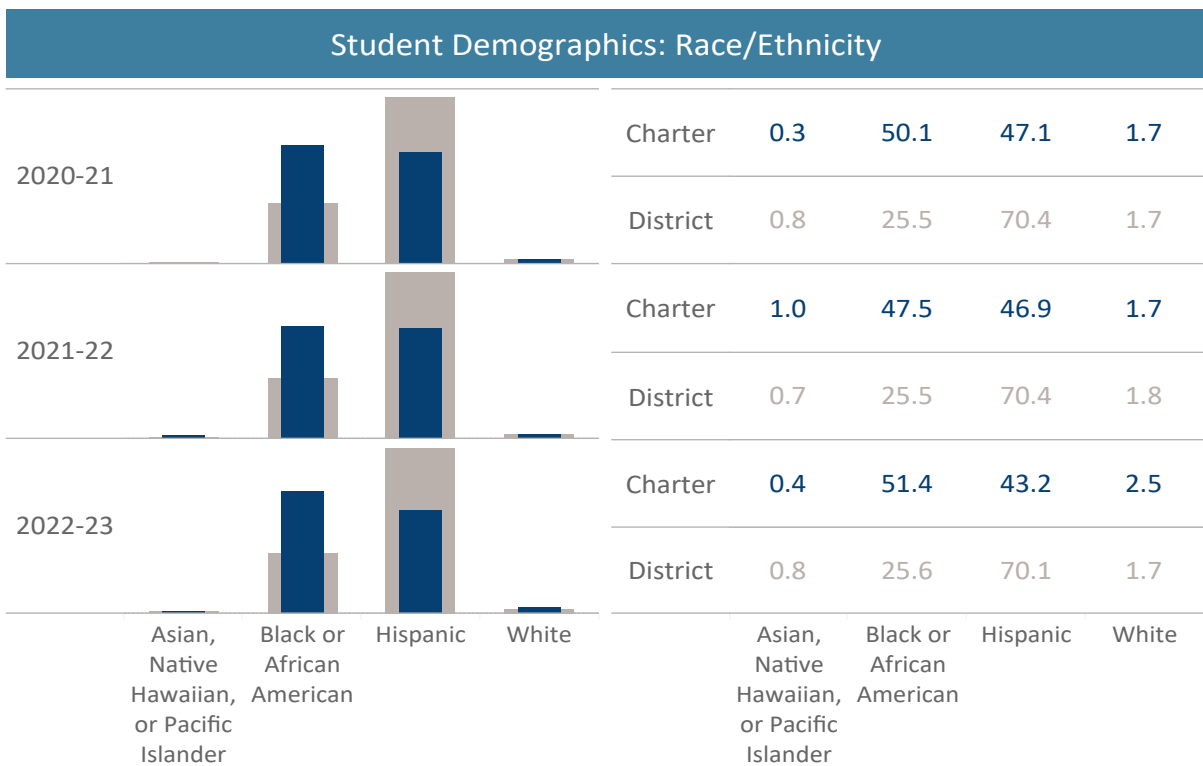
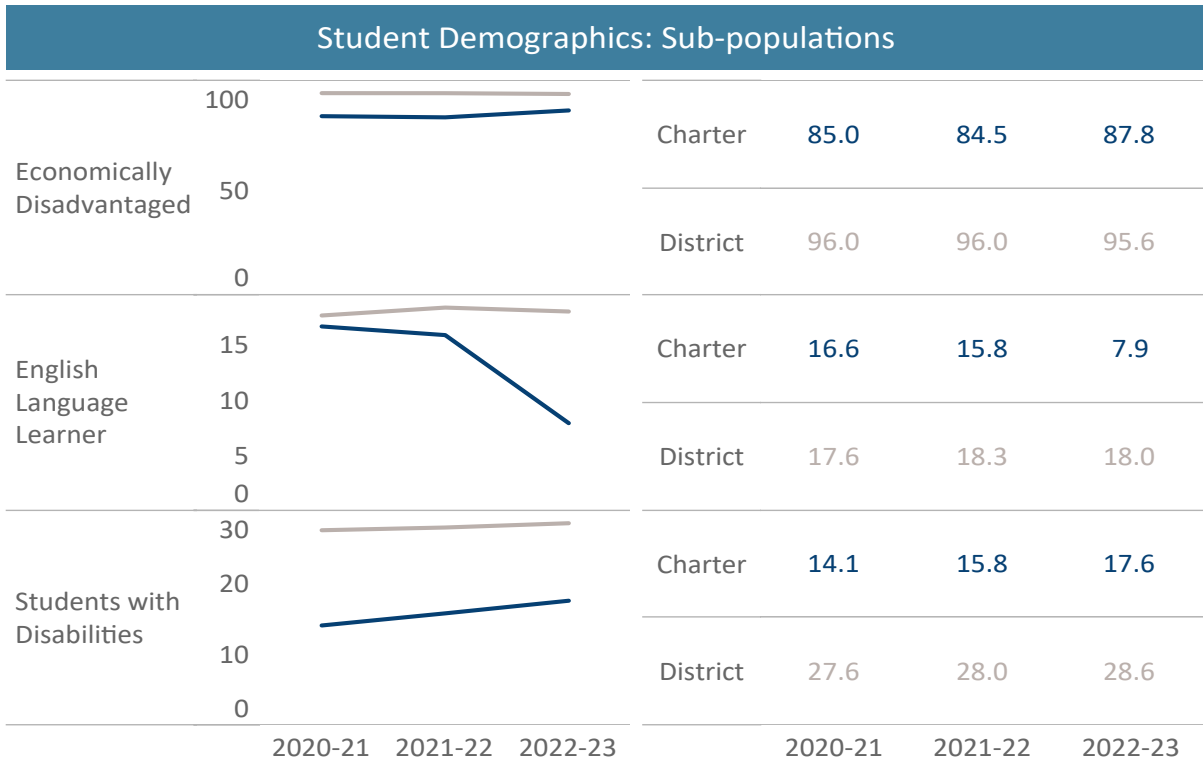
Bronx CSD 12



APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School II

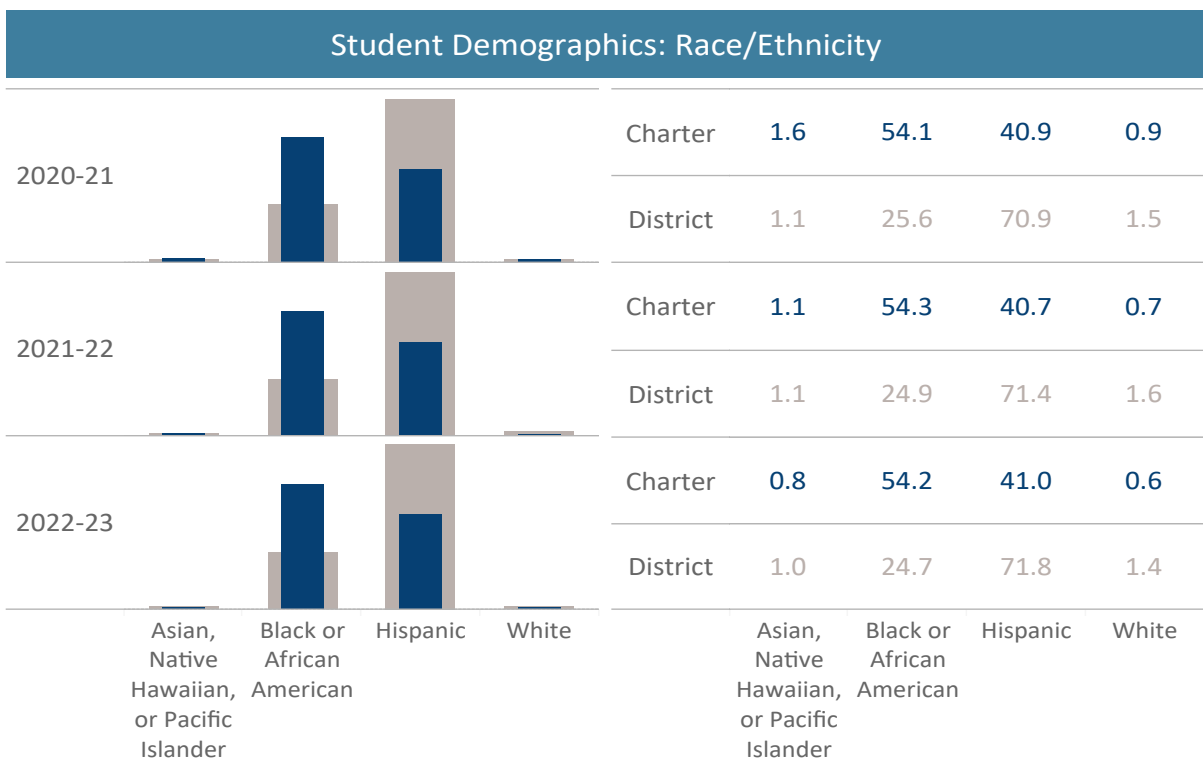
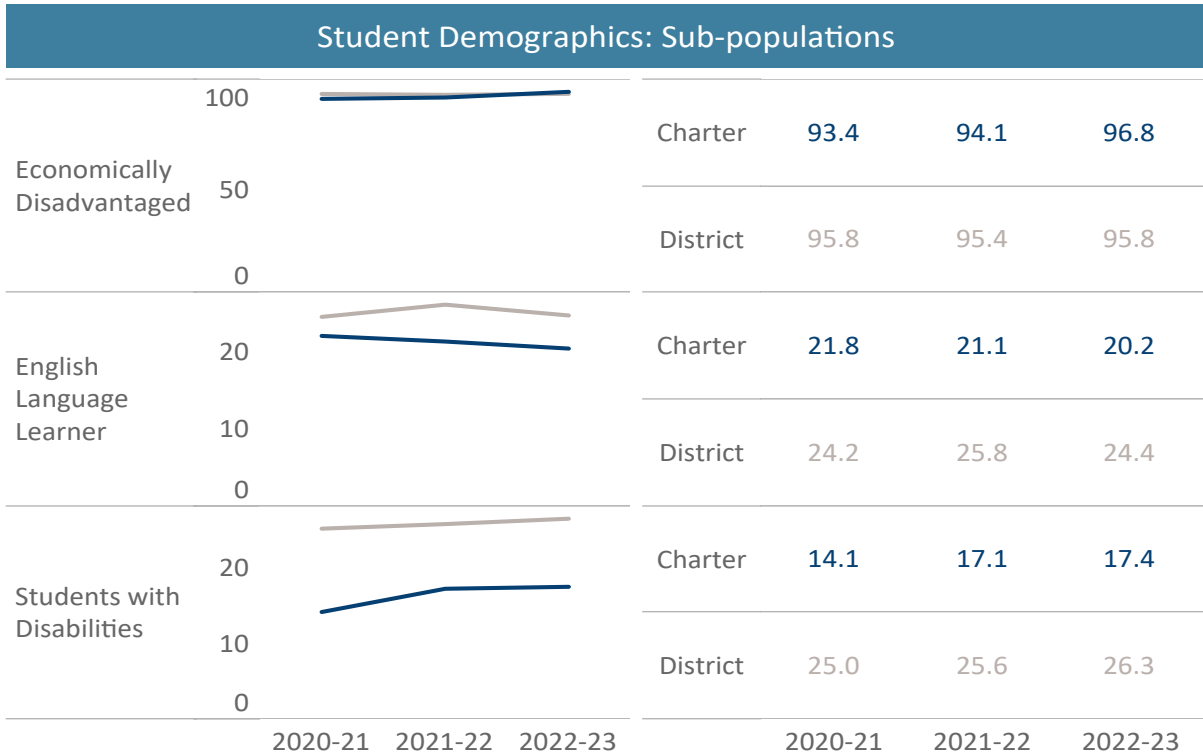
Bronx CSD 7



APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School III

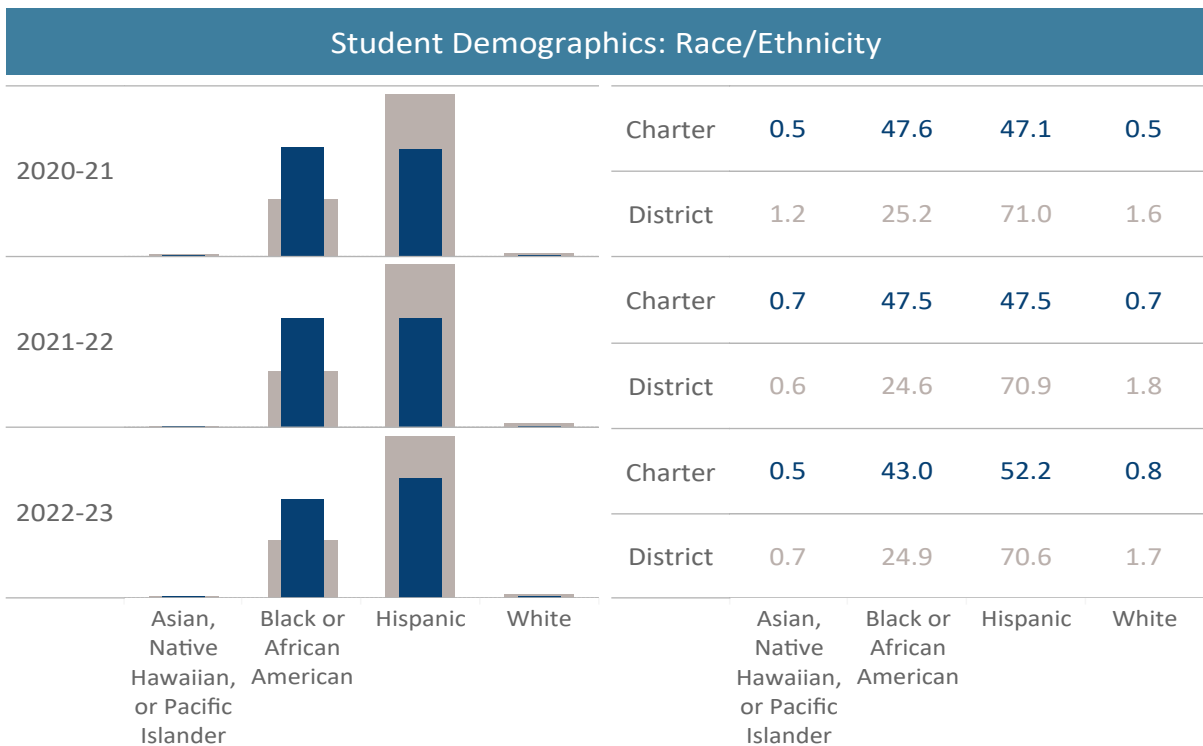
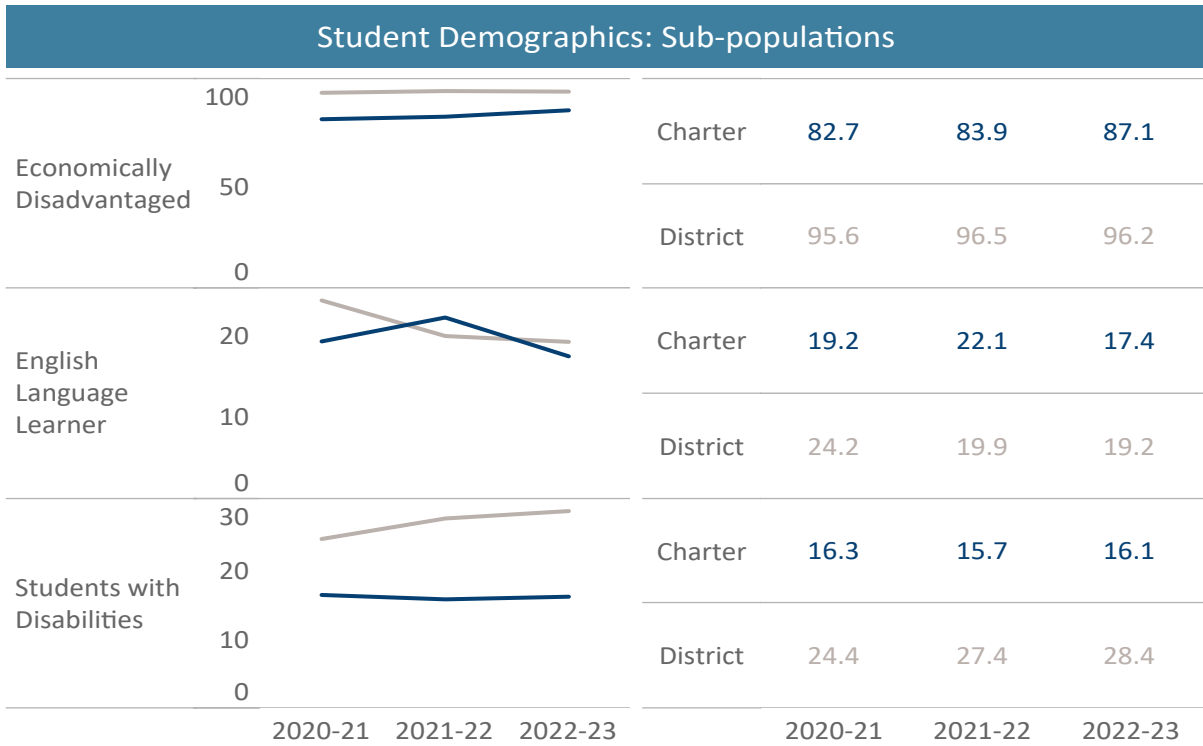
Bronx CSD 9



APPENDIX B: EXISTING SCHOOL PERFORMANCE

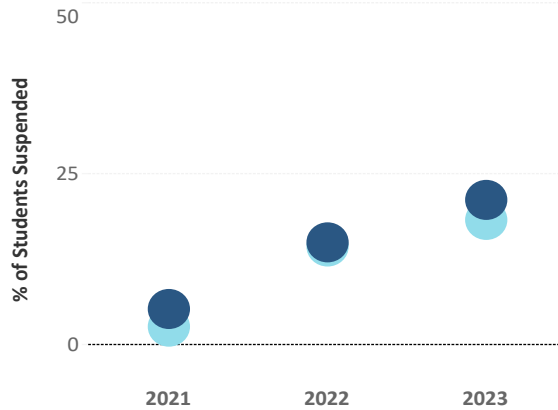
South Bronx Classical Charter School IV

Bronx CSD 7



APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School



Bronx CSD 12

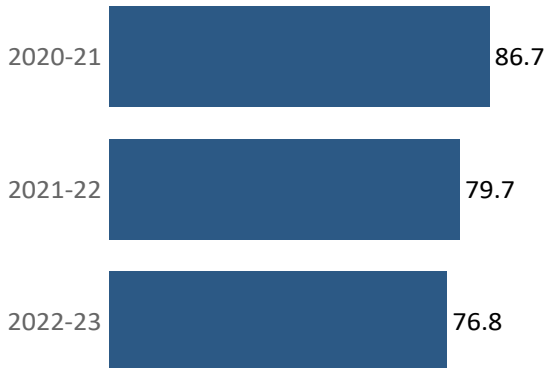
ISS Rate

OSS Rate

2021	2.8	5.4
2022	14.5	15.1
2023	18.4	21.3

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

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

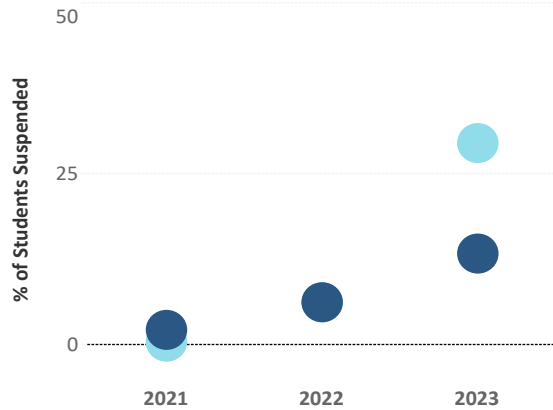


Expulsions: The number of students expelled from the charter each year

2021	2022	2023
0	0	0

APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School II

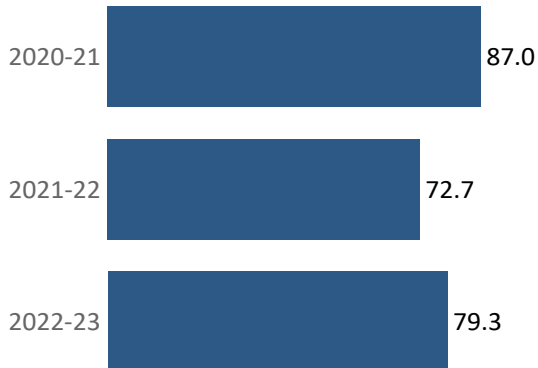


Bronx CSD 7

	ISS Rate	OSS Rate
2021	0.6	2.3
2022	6.3	6.3
2023	29.6	13.5

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

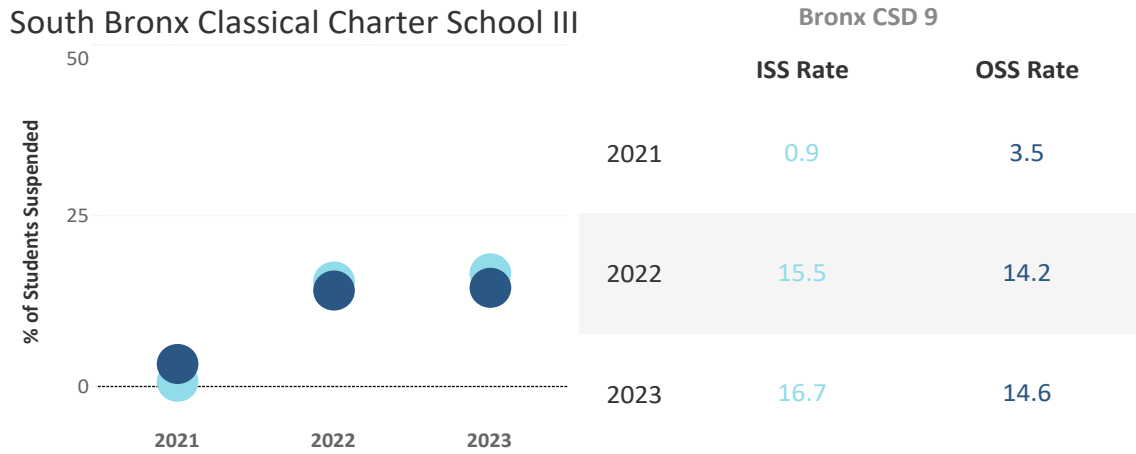
Persistence in Enrollment: The percentage of students eligible to return from previous year who did return



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

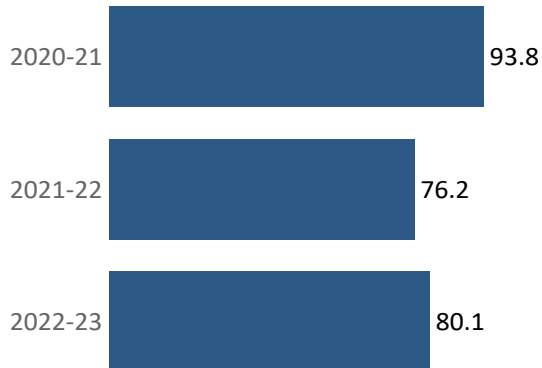
	2021	2022	2023
Expulsions	0	0	0

APPENDIX B: EXISTING SCHOOL PERFORMANCE



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

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

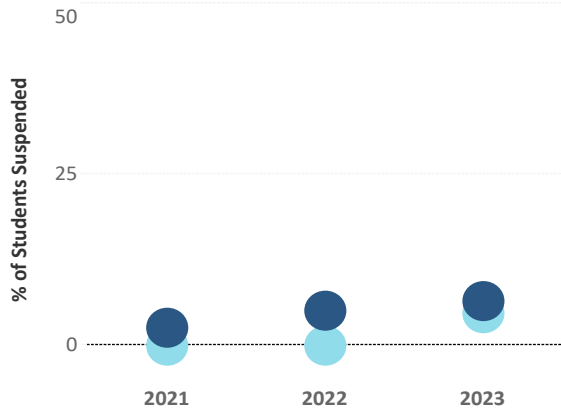


Expulsions: The number of students expelled from the charter each year

2021	2022	2023
0	0	0

APPENDIX B: EXISTING SCHOOL PERFORMANCE

South Bronx Classical Charter School IV

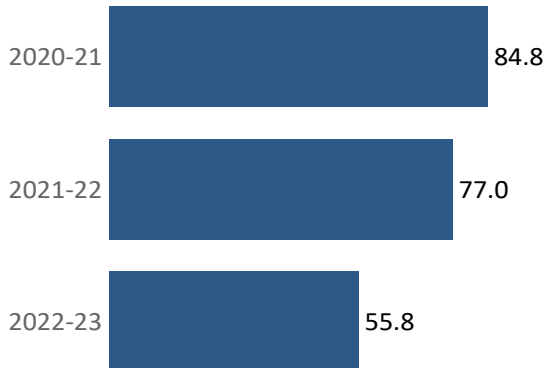


Bronx CSD 7

	ISS Rate	OSS Rate
2021	0.0	2.6
2022	0.0	5.1
2023	4.7	6.5

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

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



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

	2021	2022	2023
Expulsions	0	0	0

APPENDIX C: FISCAL DASHBOARD

South Bronx Classical Charter School

CHARTER INFORMATION

BALANCE SHEET

Assets

Current Assets

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

Total Current Assets - GRAPH 1

Property, Building and Equipment, net
Other Assets

Total Assets - GRAPH 1

2018-19	2019-20	2020-21	2021-22	2022-23
5,016,325	7,874,037	3,928,765	3,739,920	6,417,892
1,236,192	969,900	1,533,942	2,261,438	2,374,217
7,493	9,138			
56,918	453,190	924,410	634,168	553,407
			339	19,761
6,316,928	9,306,265	6,387,117	6,635,865	9,365,277
3,099,698	3,227,593	3,530,243	3,110,554	124,965,207
1,634,900	1,638,046	6,066,982	5,949,951	5,465,980
11,051,526	14,171,904	15,984,342	15,696,370	139,796,464

Liabilities and Net Assets

Current Liabilities

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

Total Current Liabilities - GRAPH 1

Deferred Rent/Lease Liability

All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

587,334	407,496	756,862	810,505	780,568
790,112	800,563	963,277	961,621	1,067,652
58,781	47,574	3,118,725	1,990,976	2,044,668
1,436,227	1,255,633	4,838,864	3,763,102	3,892,888
	684,492	492,818	2,525,254	122,863,360
	3,335,400			
1,436,227	5,275,525	5,331,682	6,288,356	126,756,248

Net Assets

Without Donor Restrictions
With Donor Restrictions

Total Net Assets

Total Liabilities and Net Assets

9,315,299	7,346,379	10,502,660	8,883,014	13,040,216
300,000	1,550,000	150,000	525,000	439,598
9,615,299	8,896,379	10,652,660	9,408,014	13,040,216

11,051,526	14,171,904	15,984,342	15,696,370	139,796,464
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ACTIVITIES

Operating Revenue

Resident Student Enrollment
Students with Disabilities

Grants and Contracts

State and local
Federal - Title and IDEA
Federal - Other
Other

NYC DoE Rental Assistance
Food Service/Child Nutrition Program

Total Operating Revenue

20,696,902	21,334,010	26,720,760	30,801,412	32,365,844
2,077,352	2,326,050	108,621	104,731	103,455
232,742	239,361	310,593	394,196	439,598
1,806,671	1,255,809	2,102,819	3,823,573	6,952,954
91,318				
24,904,985	25,155,230	29,242,793	35,123,912	39,861,851

Expenses

Regular Education
SPED
Other

Total Program Services

Management and General
Fundraising

Total Expenses - GRAPHS 2, 3 & 4

18,978,737	20,326,009	24,688,817	28,505,460	31,373,438
1,644,293	1,973,438	2,866,558	3,303,762	3,626,607
20,623,030	22,299,447	27,555,375	31,809,222	35,000,045
4,417,436	5,142,817	4,979,445	5,522,918	5,893,628
83,145	94,321	199,673	239,876	246,869
25,123,611	27,536,585	32,734,493	37,572,016	41,140,542

Surplus / (Deficit) From School Operations

(218,626)	(2,381,355)	(3,491,700)	(2,448,104)	(1,278,691)
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Support and Other Revenue

Contributions
Fundraising
Miscellaneous Income
Net assets released from restriction

Total Support and Other Revenue

1,319,998	1,418,096	5,097,981	1,235,753	4,910,893
222,918	244,339		(32,295)	
1,542,916	1,662,435	5,097,981	1,203,458	4,910,893

Total Unrestricted Revenue

Total Temporarily Restricted Revenue

Total Revenue - GRAPHS 2 & 3

26,447,901	26,817,665	31,005,374	41,140,542	41,525,365
		150,000	308,835	
26,447,901	26,817,665	31,155,374	41,449,377	41,525,365

Change in Net Assets

Net Assets - Beginning of Year - GRAPH 2

Prior Year Adjustment(s)

Net Assets - End of Year - GRAPH 2

1,324,290	(718,920)	1,756,281	(1,244,646)	3,632,202
8,291,009	9,615,299	8,896,379	10,652,660	9,408,014
-	-	-	-	-
9,615,299	8,896,379	10,652,660	9,408,014	13,040,216

APPENDIX C: FISCAL DASHBOARD

CHARTER INFORMATION - (Continued)

Functional Expense Breakdown

Personnel Service
Administrative Staff Personnel
Instructional Personnel
Non-Instructional Personnel
Personnel Services (Combined)
Total Salaries and Staff
Fringe Benefits & Payroll Taxes
Retirement
Management Company Fees
Building and Land Rent / Lease / Facility Financing
Staff Development
Professional Fees, Consultant & Purchased Services
Marketing / Recruitment
Student Supplies, Materials & Services
Depreciation
Other

2018-19	2019-20	2020-21	2021-22	2022-23
4,512,405	5,560,743	5,729,926	6,220,714	6,635,925
9,548,650	9,796,318	11,739,594	12,703,330	14,473,558
274,292	220,144	29,538		393,540
			174,510	
14,335,347	15,577,205	17,499,058	19,098,554	21,503,023
2,287,422	2,463,054	2,827,279	2,950,829	3,342,106
512,490	621,834	717,527	770,572	831,160
2,551,652	3,819,737	5,982,030	7,810,536	7,106,364
60,790	81,521	2,602	32,805	697,890
1,675,361	1,756,665	616,830	937,613	467,833
307,190	321,392	356,363	713,704	890,462
288,299	1,404,007	1,868,019	1,935,999	3,389,367
380,944	460,094	575,228	608,797	972,074
2,724,116	1,031,076	2,289,557	2,712,607	1,940,263
25,123,611	27,536,585	32,734,493	37,572,016	41,140,542

Total Expenses

CHARTER ANALYSIS

Financial Responsibility Composite Scores - GRAPH 6

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

3.0	2.2	2.8	2.0	2.0
Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong

Working Capital - GRAPH 7

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

4,880,701	8,050,632	1,548,253	2,872,763	5,472,389
18.5%	30.0%	5.0%	7.0%	13.2%
4.4	7.4	1.3	1.8	2.4
LOW	LOW	HIGH	MEDIUM	MEDIUM
Excellent	Excellent	Poor	Good	Good

Quick (Acid Test) Ratio

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

4.4	7.1	1.1	1.6	2.3
LOW	LOW	MEDIUM	MEDIUM	MEDIUM
Excellent	Excellent	Good	Good	Good

Debt to Asset Ratio - GRAPH 7

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

0.1	0.4	0.3	0.4	0.9
LOW	LOW	LOW	LOW	MEDIUM
Excellent	Excellent	Excellent	Excellent	Good

Months of Cash - GRAPH 8

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

2.4	3.4	1.4	1.2	1.9
MEDIUM	LOW	MEDIUM	MEDIUM	MEDIUM
Good	Excellent	Good	Good	Good



Charter Schools Institute
The State University of New York

www.newyorkcharters.org

State University Plaza
353 Broadway
Albany, New York 12246
518-445-4250