

# THE SUNY CHARTER SCHOOLS INSTITUTE

*SCHOOL EVALUATION REPORT*  
**KIPP TECH VALLEY CHARTER  
SCHOOL**

*VISIT DATE: MARCH 14 – 15, 2024*  
*REPORT DATE: MAY 16, 2024*

*SUNY Charter Schools Institute*

*H. Carl McCall SUNY Building*

*353 Broadway*

*Albany, NY 12246*

*518.445.4250*

*[www.newyorkcharters.org](http://www.newyorkcharters.org)*



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

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## INTRODUCTION

### INTRODUCTION

This School Evaluation Report offers an analysis of evidence collected during the school visit to KIPP Tech Valley Charter School (“KIPP Tech Valley”) on March 14 – 15, 2024. While the SUNY Charter Schools Institute (the “Institute”) conducts a comprehensive review of evidence related to all the State University of New York Charter Renewal Benchmarks (the “SUNY Renewal Benchmarks”) near the end of a charter term, most mid-cycle charter school evaluation visits focus on a subset of these benchmarks addressing the academic success of the charter and the effectiveness and viability of the charter school organization. It provides a framework for examining the quality of the educational program, focusing on teaching and learning (e.g., curriculum, pedagogy, assessment, and services for at-risk students), as well as leadership, organizational capacity, and board oversight. The Institute uses the established criteria on a regular basis to provide schools with a consistent set of expectations leading up to renewal.

Appendix A to the report contains a Charter Overview with descriptive and historical information about the school, as well as background information on the conduct of the visit. Together this information puts the visit in the context of the school’s current charter cycle. Appendix B provides the SUNY Renewal Benchmarks.

This report serves as a summary of the school’s program based on a subset of the SUNY Renewal Benchmarks. The Institute intends this selection of information to be an exception report in order to highlight areas of concern. As such, limited detail about positive elements of the educational program does not indicate the Institute does not recognize the program’s overall effectiveness.





## CHARTER BACKGROUND

# KIPP TECH VALLEY CHARTER SCHOOL

1 Dudley Heights, Albany, NY, 12210 | Grades: K-4 | Albany City School District  
321 Northern Blvd, Albany, NY, 12210 | Grades: 5-8 | Albany City School District

The State University of New York Board of Trustees (the “SUNY Trustees”) approved the original charter for KIPP Tech Valley on January 27, 2004. The school opened its doors in the fall of 2005, serving 90 students in 5<sup>th</sup> grade. The SUNY Trustees approved Albany Community Charter School and True North Troy Preparatory Charter School to merge into the education corporation effective July 1, 2020 and 2022, respectively. The education corporation was re-named KIPP Capital Region Public Charter Schools (“KIPP Capital Region” or “the education corporation”), with the authority to operate three schools: KIPP Albany Community Charter School (“KIPP Albany Community”), KIPP Tech Valley, and KIPP Troy Prep Charter School (“KIPP Troy Prep”). The increased scale facilitated by the mergers and pursuant KIPP Foundation collaboration allows for enhanced regional support from a shared services team (the “region”) for each school in the areas of curricular development, student assessment, student enrollment, staff member recruitment, professional development, legal compliance, external relations, financial management, and technology support.

### “ MISSION

*Together with families and communities, we create joyful, academically excellent schools that prepare students with the skills and confidence to pursue the paths they choose—college, career, and beyond—so they can lead fulfilling lives and build a more just world.*

### CURRENT CHARTER

Serves: Kindergarten – 8<sup>th</sup>

Chartered Enrollment:  
901

Charter Expiration:  
July 31, 2025

### KEY DESIGN ELEMENTS

Five KIPP Pillars: High expectations, choice and commitment, more time, power to lead, and focus on results;



An extended school day and year with additional enrichment experiences on select Saturdays;



Extended instructional time in ELA and mathematics;





## CHARTER BACKGROUND

### KEY DESIGN ELEMENTS CONTINUED

Daily enrichment periods in which students have an option of various activities, offset by mandatory physical education blocks every other day;	+
Mandatory three-week summer school program;	+
An electronic scoring system to track each student's progress toward mastering each individual KIPP and New York State learning standard with monthly reports for parents, teachers, and administrators; and,	+
A focus on the core values of "Choose, Improve, Respect, and Support."	+

## EXECUTIVE SUMMARY

### EXECUTIVE SUMMARY

In 2021-22 and 2022-23, the two years with credible New York State assessment data since the COVID-19 pandemic interrupted instruction, KIPP Tech Valley did not meet or come close to meeting its key academic Accountability Plan goals for English language arts (“ELA”) and mathematics. In 2023-24, the final year of its Accountability Period, the school must show meaningful academic achievement gains to make the best possible case for renewal in 2024-25. The Institute’s evaluation visit to KIPP Tech Valley in March 2024 contextualizes the school’s performance as it prepares for the charter renewal process during 2024-25.

Despite some school level improvements since the Institute’s most recent visit in spring 2023, the regional staff members and school level staff members do not yet demonstrate a coordinated understanding of common goals for developing the organization’s capacity to support the educational program and a clear strategy to reach them. KIPP Tech Valley improved its overall school culture and created an environment more conducive to teaching and learning at its primary and middle school programs since the Institute’s last visit in spring 2023. Principals at the sites drove improvements in the school’s use of assessment data. Along with improved culture, lessons are more rigorous and more effective than during the Institute’s visit in spring 2023. However, the region does not provide effective supports to build the school’s capacity to deliver a completely effective educational program.

Recurrent and long term vacancies in key instructional positions hinder the capacity of the school and the region to deliver the educational program and all the functions necessary to support it with fidelity. Regional and school level leaders are continually pulled into classrooms to cover vacancies and cannot provide the close, clinical coaching teachers need to deliver effective instruction consistently. Professional learning supports from the regional staff to school leaders and teachers lack sufficient differentiation to effectively develop teachers and leaders in their respective roles. Teachers are left with little support to deliver effective instruction without these critical development structures and no comprehensive strategic plan that defines clear priorities.

The Institute conducted the evaluation of KIPP Tech Valley during the same week as an evaluation visit to KIPP Albany Community due to low student achievement results at both schools. During evaluation visits in two consecutive years, the Institute again identified ineffective guidance and resource allocation from the regional shared services team to support the schools in meeting their Accountability Plan goals. As this report demonstrates, the region did not deliver the bare minimum level of staffing this school year, which led to both school and regional leaders serving in classrooms for the majority of the school year. Further, the region provided no effective, differentiated support to the school’s leadership teams to address distinct challenges at each school site. For example, during the spring 2024 visit, the Institute found that the at-risk program at the middle school does not provide adequate services for the school’s most vulnerable students due to a lack of vision for high quality instruction and centralized coordination from the region. In 2021-22, no students with disabilities scored at or above proficiency on the state’s ELA assessment. In 2022-23, only one student met the proficiency benchmark in ELA.

## ACADEMIC PERFORMANCE

### 2022-23 CHARTER PERFORMANCE REVIEW

At the beginning of the Accountability Period,<sup>1</sup> the school developed and adopted an Accountability Plan that set academic goals in the key subjects of ELA and mathematics. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. Throughout the charter term, the Institute examines results for five required Accountability Plan measures on an annual basis and provides an Accountability Dossier to each school detailing the school's progress toward meeting its Accountability Plan goals. Because the Act requires charters be held "accountable for meeting measurable student achievement results"<sup>2</sup> and states the educational programs at a charter school must "meet or exceed the student performance standards adopted by the board of regents"<sup>3</sup> for other public schools, SUNY's required accountability measures rest on performance as measured by statewide assessments. More information about the required Accountability Plan measures can be found on the [Institute's website](#).

In 2022-23, the third year of the school's charter term and fourth year of its current Accountability Period, KIPP Tech Valley did not meet its key academic Accountability Plan goals in ELA or mathematics. This is the second consecutive year the school failed to meet its goals. Based on this record of achievement, KIPP Tech Valley's prospects for renewal are currently in jeopardy. The school must meaningfully improve its performance to make the best case for renewal.

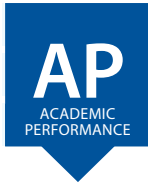
KIPP Tech Valley did not meet its ELA goal. The school met the target for only one of five measures under its goal. With only 30% of its students enrolled in at least their second year scoring at or above proficiency on the state's 3<sup>rd</sup> – 8<sup>th</sup> grade ELA exam the school performed 45 percentage points below the absolute target of 75% and narrowly outperformed the Albany City School District (the "district") by three percentage points. KIPP Tech Valley posted an effect size of -0.46 according to the Institute's comparative performance analysis. This level of performance is lower than the target of 0.30 and indicates the school performed lower than expected compared to schools across the state enrolling similar percentages of economically disadvantaged students. The school posted a mean growth percentile of 48 and did not meet its growth measure target of 50 in 2022-23.

In 2022-23, KIPP Tech Valley did not meet its mathematics goal. The school met no targets included under its goal. That year, only 26% of students enrolled in at least their second year scored at or above proficiency on the state's mathematics exam falling 49 percentage points below the absolute target of 75%. Notably, 48% of the school's tested students scored at Performance Level 1 indicating performance far below grade level expectations. KIPP Tech Valley's students enrolled for at least two years posted a proficiency rate approximately the same as the district. The school posted a mathematics effect size of -0.66 indicating that the school performed lower than expected in comparison to demographically similar schools across the state. The school's mean growth percentile of 43 was under the target of 50.

1. Because the SUNY Trustees make a renewal decision before student achievement results for the final year of a charter term become available, the Accountability Period ends with the school year prior to the final year of the charter term. In the case of initial renewal, the Accountability Period covers the first four years of the charter term.

2. Education Law § 2850(2)(f).

3. Education Law § 2854(1)(d).

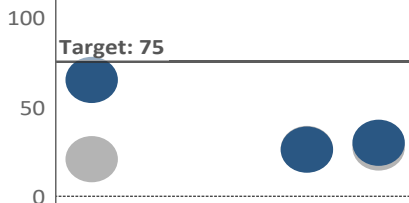


# ACADEMIC PERFORMANCE

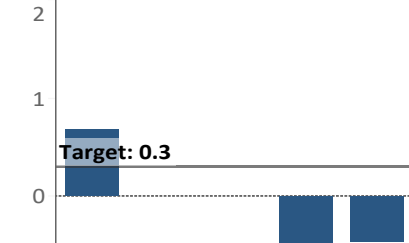
## KIPP TECH VALLEY CHARTER SCHOOL

### ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

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



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



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



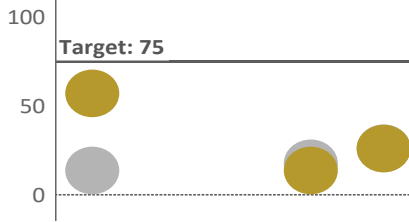
Test Year	Comp Grades	District %	Charter %
2019	6-8	21	65
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-8	27	27
2023	3-8	28	30

Test Year	Test Grades	ED%	Effect Size
2019	5-8	72.0	0.68
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-8	76.4	-0.61
2023	3-8	85.1	-0.46

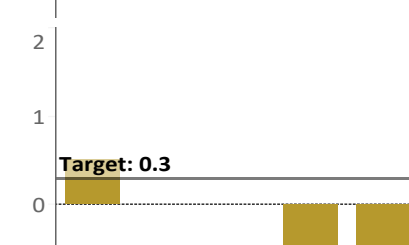
Test Year	Charter Mean Growth
2019	54.2
2020	N/A
2021	N/A
2022	N/A
2023	48.3

### MATHEMATICS ACCOUNTABILITY PLAN GOAL

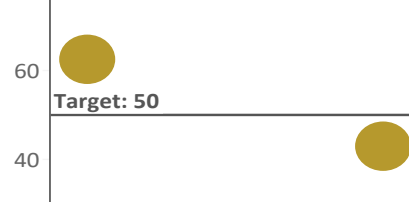
**District Comparison.** The percentage of students at **the charter** performing at or above proficiency in mathematics compared to the district.



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



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



Test Year	Comp Grades	District %	Charter %
2019	6-8	14	57
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-8	18	14
2023	3-8	26	26

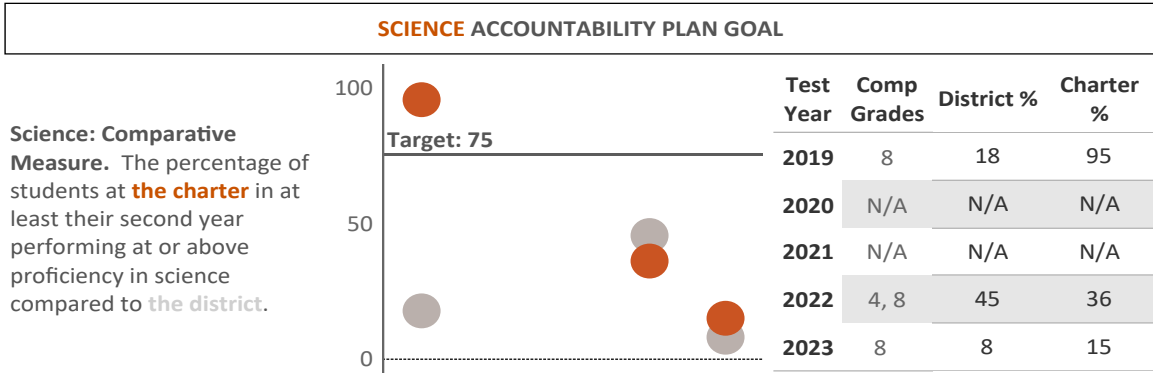
Test Year	Test Grades	ED%	Effect Size
2019	5-8	72.1	0.51
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-8	76.4	-1.04
2023	3-8	85.1	-0.66

Test Year	Charter Mean Growth
2019	62.8
2020	N/A
2021	N/A
2022	N/A
2023	43.1



# ACADEMIC PERFORMANCE

## KIPP TECH VALLEY CHARTER SCHOOL



	2019		2022		2023	
	ELA	Math	ELA	Math	ELA	Math
School Tested Number	295	300	574	569	570	559
School Tested %	92.2%	93.8%	90.5%	90.2%	97.9%	96.5%
District Tested %	77.7%	72.0%	81.6%	72.7%	85.7%	83.1%

	2019	2022	2023
Students with Disabilities Tested on State Exam	14	27	29
Charter Percent Proficient on ELA Exam	0.0	0.0	3.4
District Percent Proficient	2.3	2.0	3.1
Tested on NYSESLAT Exam	15	20	27
Charter Percent 'Commanding' or Making Progress	13.3	15.0	11.1

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

## BENCHMARK SUMMARY

### QUALITATIVE BENCHMARK ANALYSIS

The SUNY Renewal Benchmarks, grounded in the body of research from the Center for Urban Studies at Harvard University,<sup>4</sup> describe the elements in place at schools that are highly effective at providing students from low-income backgrounds the instruction, content, knowledge, and skills necessary to produce strong academic performance. The SUNY Renewal Benchmarks, found in Appendix B, describe the elements an effective charter school must have in place at the time of renewal.<sup>5</sup>

### ASSESSMENT

KIPP Tech Valley implements a valid and reliable assessment system aligned to state standards. For diagnostic testing and benchmarking, the school administers i-Ready and interim assessments aligned to the New York State exams in ELA and mathematics three times per year. In Kindergarten – 2<sup>nd</sup> grade, teachers use the DIBELS assessment to monitor students' attainment of early literacy and phonics skills. The regional teaching and learning team creates interim assessments and holds schools accountable for the testing calendar throughout the school year. The regional managing director of data and assessments compiles data dashboards for board members, regional leaders, and school leadership teams for analysis and response. In addition to benchmark measures, teachers use curriculum-embedded unit assessments and exit tickets to monitor student progress, along with checks for understanding and daily observations of student work to determine whether gaps in mastery are the result of skill and knowledge deficits or other external factors, such as attendance or unmet social and emotional needs.

Teachers use assessment results to create leveled intervention groups under the guidance of instructional leaders. During core instruction and daily intervention blocks, teachers and interventionists deliver small group, data-informed instruction. Every two weeks, teachers administer assessments to progress monitor their students, and staff members understand and own the school's data-driven practices and the ongoing assessment analysis and response cycle. In the elementary program, leaders strategically deploy resources to support students who are two or more years below grade level with differentiated intervention time in both ELA and mathematics. The school communicates students' academic and attendance data results regularly to families using email, weekly and quarterly progress reports, and updates on PowerSchool, the school's student information system.

### CURRICULUM

KIPP Tech Valley has a clear curricular framework to guide teachers in their instructional planning, but the school has not yet provided sufficient supporting tools and resources to accommodate the diversity of teachers' skills and scope of student needs. The school uses Core Knowledge Language Arts ("CKLA") in Kindergarten – 2<sup>nd</sup> grade for foundational literacy instruction and KIPP Wheatley in 3<sup>rd</sup> – 8<sup>th</sup> grade for ELA, as

4. An extensive body of research, including a [report from Harvard](#) and a [report from the United States General Accounting Office](#), identifying and confirming the correlates of effective schools exists dating back four decades.

5. Additional details regarding the SUNY Renewal Benchmarks are available on the [Institute's website](#).

## BENCHMARK SUMMARY

well as Illustrative Math and Amplify Science. The regional teaching and learning team provides scope and sequence documents and makes all unit materials available to teachers to create their lesson plans. Most teachers implement the curriculum with fidelity and plan purposeful lessons.

KIPP Capital Region offers ongoing professional development on the curricula and staff members indicate they have opportunities to share feedback on challenges they identify with the content or implementation. However, leaders and teachers note given the quantity of inexperienced teachers or those covering vacancies and leaves of absence, the existing professional development is not differentiated enough to support the scope of teachers' planning needs. To address this challenge, instructional coaches and grade team leads in the elementary program use grade team meetings to norm teachers on lesson internalization and practice delivering instruction. At the middle school program, where many teachers are new to the curricula, instructional leaders do not yet leverage coaching and collaborative meeting times to adapt the curricular programs for staff members' needs. Although lesson planning and awareness of what to teach has improved since the spring 2023 visit, many teachers still require additional support for how to plan and deliver instruction to engage all students.

### **PEDAGOGY**

KIPP Tech Valley improved instructional quality and student engagement across the charter since the Institute's spring 2023 visit. Despite the school's progress, the education corporation lacks coordination across the school level and regional initiatives that hinder progress.

Most observed lessons offered clear, standards-aligned objectives and supporting activities. Teachers vary techniques to gauge student understanding such as questioning strategies, circulating the classroom during independent and group work, requesting hand signals, and collecting brief written responses to end-of-lesson prompts. Teachers design lessons with appropriate pacing, clear structure, and visual cues to maximize learning time while offering clear directions for activities and transitions. Teachers establish clear expectations to minimize disruptions and foster a positive and respectful classroom environment to support learning. However, while opportunities for challenging students and fostering critical thinking are present at KIPP Tech Valley, the implementation remains inconsistent across the school due to leaders' minimal capacity to develop teachers through close, clinical coaching. Opportunities for student-to-student interactions are inconsistent and occur with varying levels of expectation.

To ensure high-quality learning experiences for all students, KIPP Capital Region must urgently improve its support to the school to allow for concerted and ongoing coaching for teachers, consistent alignment of instructional practices with instructional goals, and regular monitoring and evaluation of instructional strategies and teacher development.

## BENCHMARK SUMMARY

### INSTRUCTIONAL LEADERSHIP

Despite having regional and school level structures in place, KIPP Tech Valley does not effectively provide strong instructional leadership due to the region's inability to fill vacancies across the school. Both the elementary school and middle school sites have principals, assistant principals, and instructional coaches who set a vision for teaching and learning, clear expectations for teacher performance, and processes that would provide support for teachers to meet the vision and expectations. However, leaders are not able to effectively support teachers in their role because vacancies and temporary leaves require leaders to cover teaching duties in classrooms. Regional directors and coaches are also covering classroom vacancies, exacerbating the school's challenges to providing effective coaching and support to school level leaders and teachers.

Facing capacity constraints, leaders prioritize maintenance of school culture and teachers' compliance with lesson preparation routines. While tending to classroom coverages and other near-term emergencies caused by short staffing, leaders have not had the capacity to observe lessons frequently enough to provide teachers with sustained feedback to improve instruction. Although attention to these processes enables the school to deliver instruction each day, teachers lack the development they need to improve the effectiveness of instruction and student learning. Specific improvement goals for most teachers are unclear or absent. Midyear assessment results show most students are performing below benchmark expectations for learning growth demonstrating the vital need for more sustained and effective teacher coaching, which the school can only accomplish with consistent staffing. Regional staff members face similar challenges: with several directors and managing directors covering teaching vacancies in classrooms, leaders report they receive little support and are not well positioned to meet performance goals this year.

Leaders and teachers focus on clear and consistent lesson planning and professional development without effective coaching routines. Teachers submit lesson plans at least 10 days before delivering instruction and leaders review the plans and provide feedback. Teachers report the feedback is helpful. However, inconsistent observations and coaching mitigate the effectiveness of instructional delivery, despite clear feedback about the quality of planning. Although regional staff provide professional development to school leaders and teachers, the sessions do not differentiate content to address teacher needs by grade level or areas where teachers struggle. The region's professional development sessions primarily address strategies to effectively implement the schools' new curricula and provide teachers and leaders few opportunities to confer about common challenges. Although professional development on implementing the curricular materials is helpful, the region misses opportunities to differentiate session content, drill down on more specific goals, and support teachers struggling with other aspects of their practice.

The school's staffing challenges and struggles to establish clear goals and expectations for all teachers prevent instructional leaders from holding teachers accountable for student performance. In some cases, leaders were forced to evaluate staff members using rubrics for positions outside of their official job duties. For instance, a principal was forced to evaluate an instructional coach using the performance rubric for teaching because most of the instructional coach's time for the first half of the year was spent delivering classroom instruction.

## BENCHMARK SUMMARY

### AT-RISK PROGRAM

KIPP Tech Valley uses appropriate procedures to identify students with disabilities, English language learners (“ELLs”), and students struggling academically, but has systems to meet only some educational needs of at-risk students. In the elementary program, general education teachers, special education teachers, and interventionists implement effective techniques to support all learners in the classroom and a cohesive intervention schedule to meet the needs of at-risk students. Based on i-Ready and state assessment data, leaders sort students into daily intervention periods for ELA and mathematics during which teachers provide targeted small group instruction based on students’ goals. Teachers monitor progress every two weeks, and the school’s child study team reviews multiple data sources to determine whether and why students are stagnating and move at-risk students through a multi-tiered system of supports to address documented gaps. The child study team communicates with parents throughout this process and compiles data to make a referral to the district’s committee on special education (“CSE”) when needed, under the guidance of the director of student supports and school psychologist.

Despite the strong practices evident at the elementary school program, the middle school program does not implement a defined response to intervention (“RTI”) system to support students struggling academically. Middle school leaders and teachers recognize the need to establish a tiered continuum of services to ensure that students who do not make adequate growth with intervention or otherwise struggle in the educational environment receive appropriate supports. Interventionists, special education teachers, and general education teachers operate in isolation, without a clear RTI system or opportunities to collaborate on student needs and strategies for supporting all learners in the classroom. Content teachers facilitate leveled i-Ready practice for all students during 30 minutes of each core content period, and specialized teachers pull small groups of students who are one to two grade levels behind during this block; however, the school does not have a formal process for monitoring and referring students who do not make sufficient growth within the existing structures.

Across the Kindergarten – 8<sup>th</sup> grade program, at-risk program staff members cite a lack of special education, intervention, and ELL centered professional development and training at the regional level. Teachers and leaders require additional time, resources, and guidance to prioritize programming for at-risk students and formal collaboration opportunities with general education teachers to improve the quality and consistency of support systems throughout the school.

### ORGANIZATIONAL CAPACITY

KIPP Tech Valley’s organizational capacity supports the delivery of the educational program but staffing challenges compromise the effectiveness of instructional delivery, requiring more urgent attention from KIPP Capital Region.

The school establishes a co-leader model allowing principals to serve as the academic head of school while directors of operations manage the operational needs of each campus. The school’s director of operations has oversight over most of the day-to-day operational responsibilities with the support of the operations team, ensuring that teachers and families know who to contact for what.

## BENCHMARK SUMMARY

This year, the school improved its overall culture and student engagement in learning activities. The school reinvigorated its culture and enhanced its use of positive behavioral incentives. KIPP Tech Valley's discipline system, policies, and procedures now promote pro-social behaviors at the elementary and middle school levels. These strategies create a space in the school buildings that is more conducive to learning.

While KIPP Tech Valley acknowledges its staffing challenges, the region's response to those challenges does not adequately support the needs of the schools. Leaders and teachers are burdened with multiple responsibilities, hindering their capacity to consistently address the nuanced educational, programmatic, and professional development needs of the school. School leaders implemented structures and systems in response to staffing challenges to support delivery of the educational program with urgency. However, these short-term solutions cannot effectively sustain support for teacher development or address all student learning needs.

Generally, teachers and leaders continue to report that they would benefit from enhanced support from KIPP Capital Region differentiated to the specific needs of the school, staff members, and student population. Instructional leaders take on additional duties and are unable to provide consistent coaching and instructional supports to teachers, especially at the middle school level. Although teachers and leaders have positive relationships and share the vision of the school, coaching and professional development remain insufficient to address students' diverse academic and social-emotional needs because of the staffing challenges.

### BOARD OVERSIGHT & GOVERNANCE

KIPP Tech Valley has not established a track record of meeting its Accountability Plan goals during this charter term. The board is implementing course corrections during the fourth year of the charter term to address the school's low performance but lacks a cogent strategy aligned to clear, measurable goals to do so.

The board and its committees receive sufficient data and information to monitor the school's academic, fiscal, and organizational health. The committee structure is appropriate to inform the business of the full board. Committees meet regularly and report out during regular meetings. Although regional staff members provide sufficient information, the board recognizes its need to request such information with clearer structures and succinct questions to the regional staff to make the information it receives more actionable. Without these structures in place, the board's routines are less effective than they would be otherwise.

Notwithstanding the board's general desire to improve academic and organizational performance across the education corporation and increase enrollment, it lacks clear organizational goals and a strategy to meet them. The board is responsible for overseeing the performance of KIPP Capital Region's executive director but its processes for doing so lacks sufficient clarity. The board bases its evaluation of the executive director on a set of competencies provided by the KIPP Foundation. Although the competencies align to common expectations for an executive director, they lack specific, targeted performance goals for the position. The board did not articulate clear goals and milestones that align to an overall strategic plan by which they expected the executive director to lead performance improvement for the organization despite recognizing the clear need for improvement.

KIPP Tech Valley

# Ax

APPENDICES

PAGES Ax 1-16

CO<sup>A</sup>  
CHARTER  
OVERVIEW

PAGE Ax 1

SB<sup>B</sup>  
SUNY RENEWAL  
BENCHMARKS

PAGE Ax 5



**KIPP CAPITAL REGION PUBLIC CHARTER SCHOOLS BOARD OF TRUSTEES<sup>1</sup>**

<b>CHAIR</b>	<b>TRUSTEES</b>
John Reilly	Dr. Shai Butler
<b>VICE CHAIR</b>	Carl S. Young
Dr. Kimberly Young Wilkins	Ronald Mexico
<b>TREASURER</b>	Robert Bellafiore
Guy Alonge III	Dr. Don-Lee Applrys
<b>SECRETARY</b>	Jeffrey Buell
Sharif Kabir	Kelly Kimborough
	Amari Duncan

**CHARTER CHARACTERISTICS**

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT <sup>2</sup>	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2019-20	693	724	104%	K – 3, 5 – 8
2020-21	845	851	101%	K – 8
2021-22	845	932	110%	K – 8
2022-23	901	909	101%	K – 8
2023-24	901	830	92%	K – 8

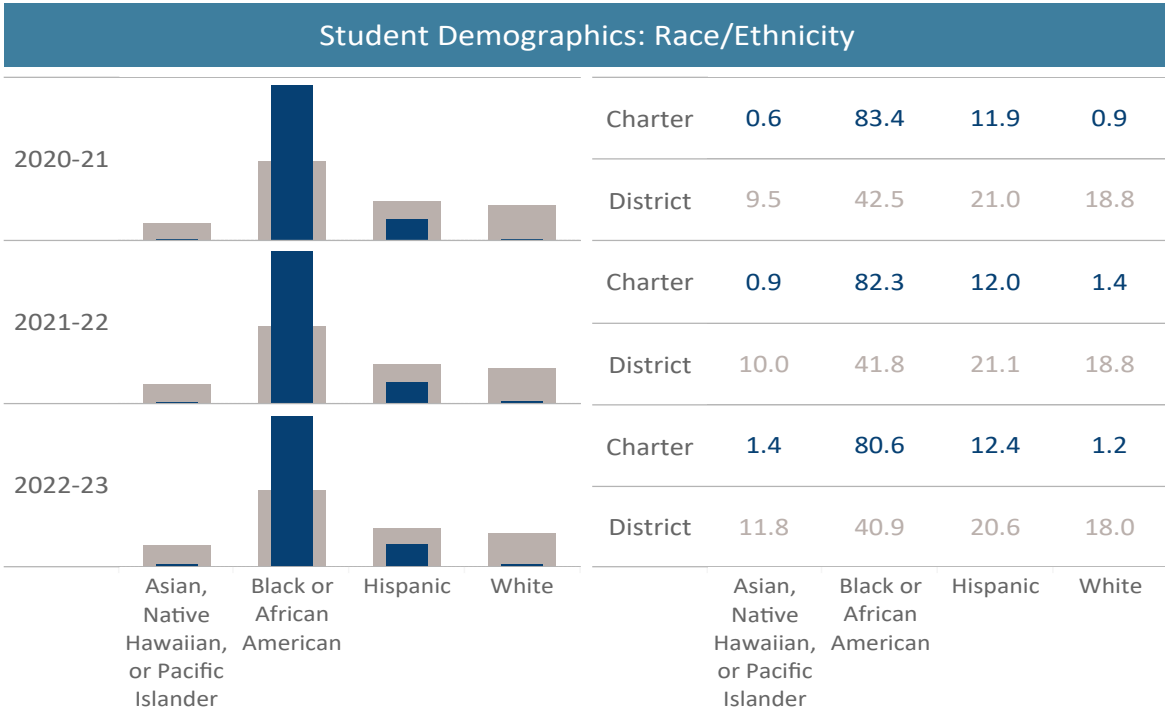
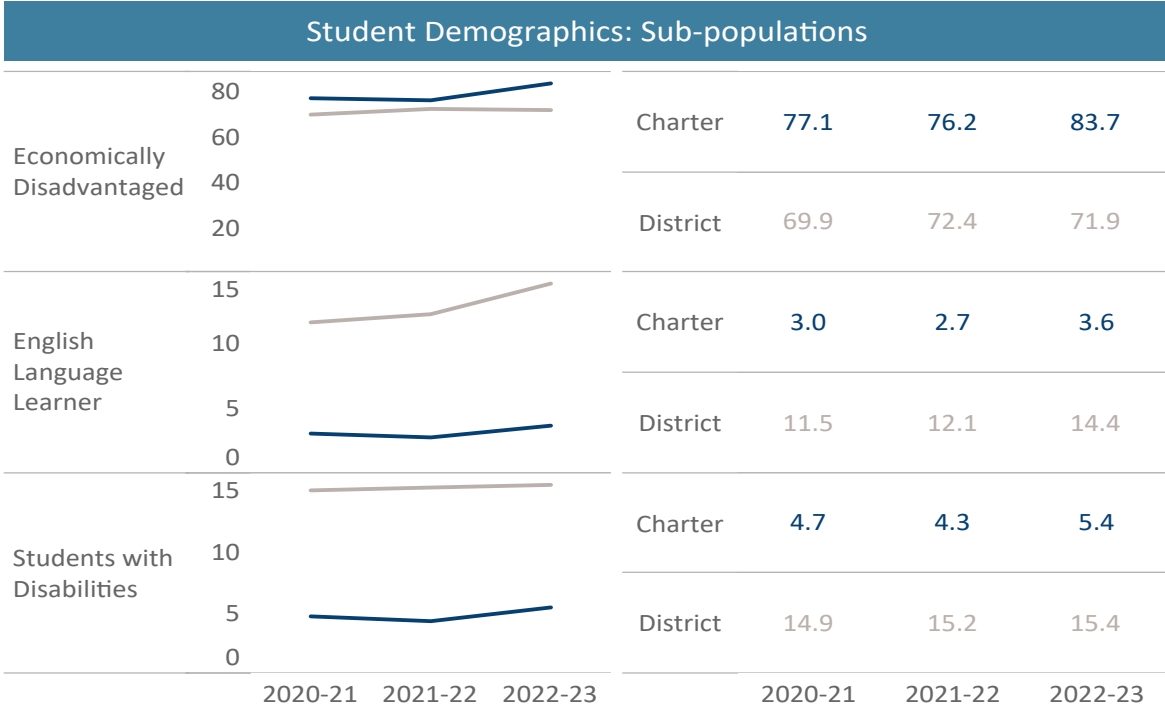
1. Source: The Institute’s board records at the time of the visit.

2. Source: Institute’s Official Enrollment Binder. (Figures may differ slightly from New York State Report Cards, depending on date of data collection.)



**KIPP Tech Valley Charter School**

**Albany City School District**

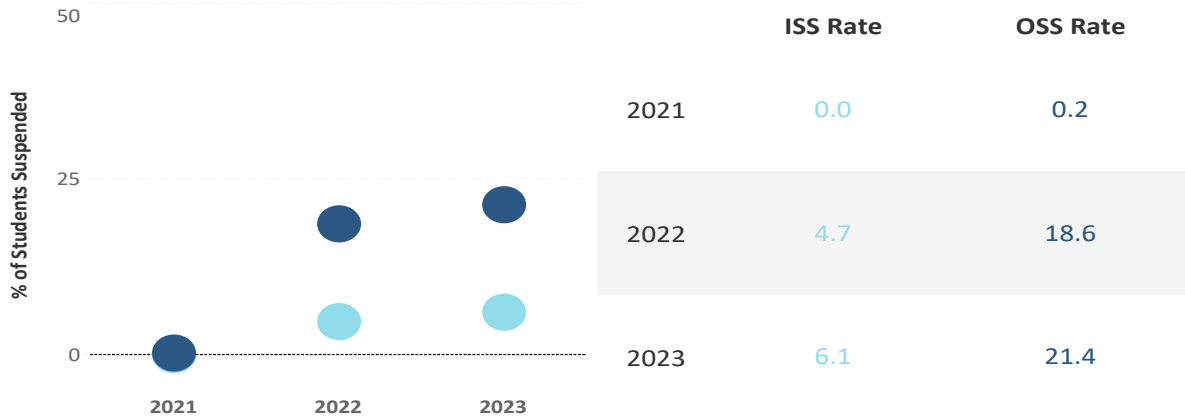


\* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED.



**KIPP Tech Valley Charter School**

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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

Year	2021	2022	2023
Expulsions	0	0	0

**KIPP Tech Valley Charter School's Enrollment and Retention Status: 2022-23**

		Target	Charter
enrollment	economically disadvantaged	73.8	83.7
	English language learners	10.6	3.6
	students with disabilities	9.9	5.4
retention	economically disadvantaged	92.4	77.3
	English language learners	95.5	83.3
	students with disabilities	93.6	81.3

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



**CHARTER SCHOOL VISIT HISTORY**

SCHOOL YEAR	VISIT TYPE	DATE
2005-06	First Year	March 23, 2006
2006-07	Evaluation Visit	March 1, 2007
2007-08	Evaluation Visit	April 29 – 30, 2008
2009-10	Initial Renewal	December 1 – 3, 2009
2011-12	Evaluation Visit	October 21, 2011
2013-14	Evaluation Visit	September 23 – 24, 2013
2014-15	Subsequent Renewal	December 9, 2014
2019-20	Subsequent Renewal	December 10 – 11, 2019
2022-23	Evaluation Visit	March 21, 2023
2023-24	Evaluation Visit	March 14 – 15, 2024

**CONDUCT OF THE VISIT**

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
March 14 – 15, 2024	Jeff Wasbes	Executive Deputy Director for Accountability
	Katy Clayton	School Evaluation Analyst
	Vickie Masséus	External Consultant

**CHARTER CYCLE CONTEXT**

CHARTER TERM	ACCOUNTABILITY PERIOD	ANTICIPATED RENEWAL VISIT
Subsequent	Fifth of Five Years	Fall 2024



### VERSION 5.0, MAY 2012

### INTRODUCTION

The State University of New York Charter Renewal Benchmarks<sup>1</sup> (the “SUNY Renewal Benchmarks”) serve two primary functions at renewal:

- They provide a framework for the Charter Schools Institute (the “Institute”) to gather and evaluate evidence to determine whether a school has made an adequate case for renewal. In turn, this evidence assists the Institute in deciding if it can make the required legal and other findings in order to reach a positive recommendation for renewal. For example, the various benchmarks that the Institute uses to determine whether the school has had fiscally responsible practices in place during the last charter period allow the Institute to determine with greater precision whether the school will operate in a fiscally sound manner during the next charter period, a finding that the New York Charter Schools Act requires the SUNY Trustees to make.
- At the same time that the SUNY Renewal Benchmarks provide a framework for the Institute to collect and review evidence, they also provide the school with a guide to understanding the Institute’s evaluative criteria. As the Institute uses the SUNY Renewal Benchmarks (or some sub-set of them) as the framework for conducting its ongoing school evaluation visits, school leaders should be fully aware of the content of the Benchmarks at the time of renewal.

The SUNY Renewal Benchmarks are organized into four inter-connected renewal questions that each school must answer when submitting a renewal application. The benchmarks further reflect the interwoven nature of schools from an academic, organizational, fiscal and/or legal perspective. For example, the Institute could reasonably place many of the academic benchmarks under the heading of organizational effectiveness. More generally, some redundancy exists because the Institute looks at the same issue from different perspectives.

Precisely how the Institute uses the SUNY Renewal Benchmarks, during both the renewal process and throughout the charter period, is explained in greater detail in the Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University of New York (the “SUNY Renewal Practices”), available on the Institute’s website at: <http://www.newyorkcharters.org/renewal/>. Responses to frequently asked questions about the Institute’s use of the SUNY Renewal Benchmarks appear below:

- The Institute does not have a point system for recommending renewal. A school cannot simply tally up the number of positive benchmark statements in order to determine the Institute’s recommendation
  - Some benchmarks are weighed more heavily than others. In particular, the Institute gives the greatest weight to how well the school has met its academic Accountability Plan goals.

*1. Research on public school reform, known as the effective schools movement, has embraced the premise that, given certain organizing and cultural characteristics, schools can teach all children the intended curriculum and hold them to high academic standards. Over the decades, the accumulated research into effective schools has yielded a set of common characteristics that all effective schools share. These characteristics are so consistently prevalent among successful schools that they have come to be known as the Correlates of Effective Schools. The Renewal Benchmarks adapt and elaborate on these correlates.*



- Despite the fact that the Accountability Plan comprises only a single benchmark, a school’s performance on that benchmark is critical. In fact, it is so important that while the Institute may recommend non-renewal for fiscal and organizational failures (if sufficiently serious), excellence in these areas will not excuse poor academic performance.
- The Institute does not use every benchmark during every kind of renewal review, and how the benchmarks are used differs depending on a school’s circumstances. For example, the Qualitative Education Benchmarks (Benchmarks 1B-1F, 2C and 2D) are given far less weight in making a renewal decision on schools that the Institute has previously renewed. Similarly, less weight is accorded to these benchmarks during an initial renewal review where a school has consistently met its academic Accountability Plan goals.
  - The Institute also may not consider every indicator subsumed under a benchmark when determining if a school has met that benchmark, given the school’s stage of development or its previous track record.
- Aside from Benchmark 1A on academic Accountability Plan goals (which is singular in its importance), no school should fear that a failure to meet every element of every benchmark means that it is not in a position to make a case for renewal. To the contrary, the Institute has yet to see a school that performs perfectly in every respect. The Institute appreciates that the benchmarks set a very high standard collectively. While the Institute certainly hopes and expects that schools aim high, it is understood that a school’s reach will necessarily exceed its grasp in at least some aspects.

In this fifth edition of the SUNY Renewal Benchmarks, the Institute has made some revisions to the Qualitative Educational Benchmarks, namely those benchmarks used for ongoing school evaluation visits, to streamline the collection of evidence. For example, the Institute has incorporated Student Order and Discipline into Pedagogy, and Professional Development into Instructional Leadership. The Institute has rewritten some of the overarching benchmark statements to capture the most salient aspects of school effectiveness, organizational viability, legal compliance, and fiscal soundness. Some of the bulleted indicators within benchmarks have been recast or eliminated. Finally, the Institute has added some indicators to align the benchmarks with changes in the Charter Schools Act (e.g., provisions in meeting enrollment and retention targets when assigned and abiding by the General Municipal Law).

It is important that the entire school community understand the renewal process. All members of a school’s leadership team and board should carefully review both the SUNY Renewal Benchmarks and the SUNY Renewal Practices. Note that a renewal overview document for parents, teacher and community members is also available on the Institute’s website at: <http://www.newyorkcharters.org/renewal/>. Please do not hesitate to contact the Institute with any questions.



### RENEWAL QUESTION 1 IS THE SCHOOL AN ACADEMIC SUCCESS?

#### 1A – ACADEMIC ACCOUNTABILITY PLAN GOALS

**OVER THE ACCOUNTABILITY PERIOD, THE SCHOOL HAS MET OR COME CLOSE TO MEETING ITS ACADEMIC ACCOUNTABILITY PLAN GOALS.**

*The Institute determines the extent to which the school has met the Accountability Plan goals in the following areas:*

- English language arts;
- mathematics;
- science;
- social studies (high school only);
- NCLB;
- high school graduation and college preparation (if applicable); and
- optional academic goals included by the school.

#### 1B – USE OF ASSESSMENT DATA

**THE SCHOOL HAS AN ASSESSMENT SYSTEM THAT IMPROVES INSTRUCTIONAL EFFECTIVENESS AND STUDENT LEARNING.**

*The following elements are generally present:*

- the school regularly administers valid and reliable assessments aligned to the school’s curriculum and state performance standards;
- the school has a valid and reliable process for scoring and analyzing assessments;
- the school makes assessment data accessible to teachers, school leaders and board members;
- teachers use assessment results to meet students’ needs by adjusting classroom instruction, grouping students and/or identifying students for special intervention;
- school leaders use assessment results to evaluate teacher effectiveness and to develop professional development and coaching strategies; and
- the school regularly communicates to parents/guardians about their students’ progress and growth.

#### 1C – CURRICULUM

**THE SCHOOL’S CURRICULUM SUPPORTS TEACHERS IN THEIR INSTRUCTIONAL PLANNING.**

*The following elements are generally present:*

- the school has a curriculum framework with student performance expectations that provides a fixed, underlying structure, aligned to state standards and across grades;

- in addition to the framework, the school has supporting tools (i.e., curriculum maps or scope and sequence documents) that provide a bridge between the curriculum framework and lesson plans;
- teachers know what to teach and when to teach it based on these documents;
- the school has a process for selecting, developing and reviewing its curriculum documents and its resources for delivering the curriculum; and
- teachers plan purposeful and focused lessons.

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## **1D – PEDAGOGY**

### **HIGH QUALITY INSTRUCTION IS EVIDENT THROUGHOUT THE SCHOOL.**

*The following elements are generally present:*

- teachers deliver purposeful lessons with clear objectives aligned to the school’s curriculum;
- teachers regularly and effectively use techniques to check for student understanding;
- teachers include opportunities in their lessons to challenge students with questions and activities that develop depth of understanding and higher-order thinking and problem solving skills;
- teachers maximize learning time (e.g., appropriate pacing, on-task student behavior, clear lesson focus and clear directions to students); transitions are efficient; and
- teachers have effective classroom management techniques and routines that create a consistent focus on academic achievement.

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## **1E – INSTRUCTIONAL LEADERSHIP**

### **THE SCHOOL HAS STRONG INSTRUCTIONAL LEADERSHIP.**

*The following elements are generally present:*

- the school’s leadership establishes an environment of high expectations for teacher performance (in content knowledge and pedagogical skills) and in which teachers believe that all students can succeed;
- the instructional leadership is adequate to support the development of the teaching staff;
- instructional leaders provide sustained, systemic and effective coaching and supervision that improves teachers’ instructional effectiveness;
- instructional leaders provide opportunities and guidance for teachers to plan curriculum and instruction within and across grade levels;
- instructional leaders implement a comprehensive professional development program that develops the competencies and skills of all teachers;
- professional development activities are interrelated with classroom practice;
- instructional leaders regularly conduct teacher evaluations with clear criteria that accurately identify teachers’ strengths and weaknesses; and
- instructional leaders hold teachers accountable for quality instruction and student achievement.



## 1F – AT-RISK STUDENTS

### THE SCHOOL MEETS THE EDUCATIONAL NEEDS OF AT-RISK STUDENTS.

*The following elements are generally present:*

- the school uses clear procedures for identifying at-risk students including students with disabilities, English language learners and those struggling academically;
  - the school has adequate intervention programs to meet the needs of at-risk students;
  - general education teachers, as well as specialists, utilize effective strategies to support students within the general education program;
  - the school adequately monitors the progress and success of at-risk students;
  - teachers are aware of their students' progress toward meeting IEP goals, achieving English proficiency or school-based goals for struggling students;
  - the school provides adequate training and professional development to identify at-risk students and to help teachers meet students' needs; and
  - the school provides opportunities for coordination between classroom teachers and at-risk program staff including the school nurse, if applicable.
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**RENEWAL QUESTION 2**

**IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?**

**2A – MISSION & KEY DESIGN ELEMENTS**

**THE SCHOOL IS FAITHFUL TO ITS MISSION AND HAS IMPLEMENTED THE KEY DESIGN ELEMENTS INCLUDED IN ITS CHARTER.**

*The following elements are generally present:*

- the school faithfully follows its mission; and
- the school has implemented its key design elements.

**2B – PARENTS & STUDENTS**

**PARENTS/GUARDIANS AND STUDENTS ARE SATISFIED WITH THE SCHOOL.**

*The following elements are generally present:*

- the school regularly communicates each child’s academic performance results to families;
- families are satisfied with the school; and
- parents keep their children enrolled year-to-year.

**2C – ORGANIZATIONAL CAPACITY**

**THE SCHOOL ORGANIZATION EFFECTIVELY SUPPORTS THE DELIVERY OF THE EDUCATIONAL PROGRAM.**

*The following elements are generally present:*

- the school has established an administrative structure with staff, operational systems, policies and procedures that allow the school to carry out its academic program;
- the organizational structure establishes distinct lines of accountability with clearly defined roles and responsibilities;
- the school has a clear student discipline system in place at the administrative level that is consistently applied;
- the school retains quality staff;
- the school has allocated sufficient resources to support the achievement of goals;
- the school maintains adequate student enrollment;
- the school has procedures in place to monitor its progress toward meeting enrollment and retention targets for special education students, ELLs and students who qualify for free and reduced price lunch, and adjusts its recruitment efforts accordingly; and
- the school regularly monitors and evaluates the school’s programs and makes changes if necessary.

## 2D – BOARD OVERSIGHT

### THE SCHOOL BOARD WORKS EFFECTIVELY TO ACHIEVE THE SCHOOL’S ACCOUNTABILITY PLAN GOALS.

*The following elements are generally present:*

- board members possess adequate skills and have put in place structures and procedures with which to govern the school and oversee management of day-to-day operations in order to ensure the school’s future as an academically successful, financially healthy and legally compliant organization;
- the board requests and receives sufficient information to provide rigorous oversight of the school’s program and finances;
- it establishes clear priorities, objectives and long-range goals, (including Accountability Plan, fiscal, facilities and fundraising), and has in place benchmarks for tracking progress as well as a process for their regular review and revision;
- the board successfully recruits, hires and retains key personnel, and provides them with sufficient resources to function effectively;
- the board regularly evaluates its own performance and that of the school leaders and the management company (if applicable), holding them accountable for student achievement; and
- the board effectively communicates with the school community including school leadership, staff, parents/guardians and students.

## 2E – GOVERNANCE

### THE BOARD IMPLEMENTS, MAINTAINS AND ABIDES BY APPROPRIATE POLICIES, SYSTEMS AND PROCESSES.

*The following elements are generally present:*

- the board effectively communicates with its partner or management organizations as well as key contractors such as back-office service providers and ensures that it receives value in exchange for contracts and relationships it enters into and effectively monitors such relationships;
- the board takes effective action when there are organizational, leadership, management, facilities or fiscal deficiencies; or where the management or partner organization fails to meet expectations; to correct those deficiencies and puts in place benchmarks for determining if the partner organization corrects them in a timely fashion;
- the board regularly reviews and updates board and school policies as needed and has in place an orientation process for new members;
- the board effectively recruits and selects new members in order to maintain adequate skill sets and expertise for effective governance and structural continuity;
- the board implements a comprehensive and strict conflict of interest policy (and/or code of ethics)—consistent with that set forth in the charter and with the General Municipal Law—and consistently abides by them throughout the term of the charter;



- the board generally avoids conflicts of interest; where not possible, the board manages those conflicts in a clear and transparent manner;
  - the board implements a process for dealing with complaints consistent with that set forth in the charter, makes the complaint policy clear to all stakeholders, and follows the policy including acting on complaints in a timely fashion;
  - the board abides by its by-laws including, but not limited to, provisions regarding trustee election and the removal and filling of vacancies; and
  - the board holds all meetings in accordance with the Open Meetings Law and records minutes for all meetings including executive sessions and, as appropriate, committee meetings.
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### 2F – LEGAL REQUIREMENTS

#### **THE SCHOOL SUBSTANTIALLY COMPLIES WITH APPLICABLE LAWS, RULES AND REGULATIONS AND THE PROVISIONS OF ITS CHARTER.**

*The following elements are generally present:*

- the school compiles a record of substantial compliance with the terms of its charter and applicable state and federal laws, rules and regulations including, but not limited to, submitting items to the Institute in a timely manner, and meeting teacher certification (including NCLB highly qualified status) and background check requirements, FOIL and Open Meetings Law;
  - the school substantially complies with the terms of its charter and applicable laws, rules and regulations;
  - the school abides by the terms of its monitoring plan;
  - the school implements effective systems and controls to ensure that it meets legal and charter requirements;
  - the school has an active and ongoing relationship with in-house or independent legal counsel who reviews and makes recommendations on relevant policies, documents, transactions and incidents and who also handles other legal matters as needed; and
  - the school manages any litigation appropriately and provides litigation papers to insurers and the Institute in a timely manner.
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**RENEWAL QUESTION 3**  
**IS THE SCHOOL FISCALLY SOUND?**

**3A – BUDGETING AND LONG RANGE PLANNING**

**THE SCHOOL OPERATES PURSUANT TO A LONG-RANGE FINANCIAL PLAN IN WHICH IT CREATES REALISTIC BUDGETS THAT IT MONITORS AND ADJUSTS WHEN APPROPRIATE.**

*The following elements are generally present:*

- the school has clear budgetary objectives and budget preparation procedures;
- board members, school management and staff contribute to the budget process, as appropriate;
- the school frequently compares its long-range fiscal plan to actual progress and adjusts it to meet changing conditions;
- the school routinely analyzes budget variances; the board addresses material variances and makes necessary revisions; and
- actual expenses are equal to, or less than, actual revenue with no material exceptions.

**3B – INTERNAL CONTROLS**

**THE SCHOOL MAINTAINS APPROPRIATE INTERNAL CONTROLS AND PROCEDURES.**

*The following elements are generally present:*

- the school follows a set of comprehensive written fiscal policies and procedures;
- the school accurately records and appropriately documents transactions in accordance with management's direction, laws, regulations, grants and contracts;
- the school safeguards its assets;
- the school identifies/analyzes risks and takes mitigating actions;
- the school has controls in place to ensure that management decisions are properly carried out and monitors and assesses controls to ensure their adequacy;
- the school's trustees and employees adhere to a code of ethics;
- the school ensures duties are appropriately segregated, or institutes compensating controls;
- the school ensures that employees performing financial functions are appropriately qualified and adequately trained;
- the school has systems in place to provide the appropriate information needed by staff and the board to make sound financial decisions and to fulfill compliance requirements;
- a staff member of the school reviews grant agreements and restrictive gifts and monitors compliance with all stated conditions;
- the school prepares payroll according to appropriate state and federal regulations and school policy;
- the school ensures that employees, trustees and volunteers who handle cash and investments are bonded to help assure the safeguarding of assets; and
- the school takes corrective action in a timely manner to address any internal control or compliance deficiencies identified by its external auditor, the Institute, and/or the State Education Department or the Comptroller, if needed.



### **3C – FINANCIAL REPORTING**

**THE SCHOOL HAS COMPLIED WITH FINANCIAL REPORTING REQUIREMENTS BY PROVIDING THE SUNY TRUSTEES AND THE STATE EDUCATION DEPARTMENT WITH REQUIRED FINANCIAL REPORTS THAT ARE ON TIME, COMPLETE AND FOLLOW GENERALLY ACCEPTED ACCOUNTING PRINCIPLES.**

*The following reports have generally been filed in a timely, accurate and complete manner:*

- annual financial statement audit reports including federal Single Audit report, if applicable;
- annual budgets and cash flow statements;
- un-audited quarterly reports of income, expenses, and enrollment;
- bi-monthly enrollment reports to the district and, if applicable, to the State Education Department including proper documentation regarding the level of special education services provided to students; and
- grant expenditure reports.

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### **3D – FINANCIAL CONDITION**

**THE SCHOOL MAINTAINS ADEQUATE FINANCIAL RESOURCES TO ENSURE STABLE OPERATIONS. CRITICAL FINANCIAL NEEDS OF THE SCHOOL ARE NOT DEPENDENT ON VARIABLE INCOME (GRANTS, DONATIONS AND FUNDRAISING).**

*The following elements are generally present:*

- the school maintains sufficient cash on hand to pay current bills and those that are due shortly;
- the school maintains adequate liquid reserves to fund expenses in the event of income loss (generally three months);
- the school prepares and monitors cash flow projections;
- If the school includes philanthropy in its budget, it monitors progress toward its development goals on a periodic basis;
- If necessary, the school pursues district state aid intercepts with the state education department to ensure adequate per pupil funding; and
- the school accumulates unrestricted net assets that are equal to or exceed two percent of the school's operating budget for the upcoming year.



**RENEWAL QUESTION 4**

**IF THE SCHOOL'S CHARTER IS RENEWED, WHAT ARE ITS PLANS FOR THE TERM OF THE NEXT CHARTER PERIOD, AND ARE THEY REASONABLE, FEASIBLE AND ACHIEVEABLE?**

**4A – PLANS FOR THE SCHOOL'S STRUCTURE**

**KEY STRUCTURAL ELEMENTS OF THE SCHOOL, AS DEFINED IN THE EXHIBITS OF THE APPLICATION FOR CHARTER RENEWAL, ARE REASONABLE, FEASIBLE AND ACHIEVABLE.**

*Based on elements present in the Application for Charter Renewal:*

- the school is likely to fulfill its mission in the next charter period;
- the school has an enrollment plan that can support the school program;
- the school calendar and daily schedules clearly provide sufficient instructional time to meet all legal requirements, allow the school to meet its proposed Accountability Plan goals and abide by its proposed budget;
- key design elements are consistent with the mission statement and are feasible given the school's budget and staffing;
- a curriculum framework for added grades aligns with the state's performance standards; and
- plans in the other required Exhibits indicate that the school's structure is likely to support the educational program.

**4B – PLANS FOR THE EDUCATIONAL PROGRAM**

**THE SCHOOL'S PLANS FOR IMPLEMENTING THE EDUCATIONAL PROGRAM ALLOW IT TO MEET ITS ACCOUNTABILITY PLAN GOALS.**

*Based on elements present in the Application for Charter Renewal:*

- for those grades served during the last charter period, the school has plans for sustaining and (where possible) improving upon the student outcomes it has compiled during the last charter period including any adjustments or additions to the school's educational program;
- for a school that is seeking to add grades, the school is likely to meet its Accountability Plan goals and the SUNY Renewal Benchmarks at the new grade levels; and
- where the school will provide secondary school instruction, it has presented a set of requirements for graduation that students are likely to meet and that are consistent with the graduation standards set by the Board of Regents.



## **4C – PLANS FOR BOARD OVERSIGHT AND GOVERNANCE**

### **THE SCHOOL PROVIDES A REASONABLE, FEASIBLE AND ACHIEVABLE PLAN FOR BOARD OVERSIGHT AND GOVERNANCE.**

*Based on elements present in the Application for Charter Renewal:*

- school trustees are likely to possess a range of experience, skills, and abilities sufficient to oversee the academic, organizational and fiscal performance of the school;
- plans by the school board to orient new trustees to their roles and responsibilities, and, if appropriate, to participate in ongoing board training are likely to sustain the board's ability to carry out its responsibilities;
- if the school plans to change an association with a partner or management organization in the term of a future charter, it has provided a clear rationale for the disassociation and an outline indicating how it will manage the functions previously associated with that partnering organization; and
- if the school is either moving from self-management to a management structure or vice-versa, or is changing its charter management organization/educational service provider, its plans indicate that it will be managed in an effective, sound and viable manner including appropriate oversight of the academic and fiscal performance of the school or the management organization.

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## **4D – FISCAL & FACILITY PLANS**

### **THE SCHOOL PROVIDES A REASONABLE, FEASIBLE AND ACHIEVABLE FISCAL PLAN INCLUDING PLANS FOR AN ADEQUATE FACILITY.**

*Based on the elements present in the Application for Charter Renewal:*

- the school's budgets adequately support staffing, enrollment and facility projections;
- fiscal plans are based on the sound use of financial resources to support academic program needs;
- fiscal plans are clear, accurate, complete and based on reasonable assumptions;
- information on enrollment demand provides clear evidence for the reasonableness of projected enrollment; and
- facility plans are likely to meet educational program needs.

