

THE SUNY CHARTER SCHOOLS INSTITUTE

*RENEWAL RECOMMENDATION SUMMARY
NEW ROOTS CHARTER SCHOOL*

*REPORT DATE: FEBRUARY 4, 2025
VISIT DATE: OCTOBER 10 – 11, 2024*



Charter Schools Institute
The State University of New York

CONTENTS

1 CHARTER SCHOOL BACKGROUND

2 EXECUTIVE SUMMARY

6 ACADEMIC PERFORMANCE DATA

7 FISCAL DASHBOARD

8 COMPLIANCE REPORTING

9 COMMUNITY SATISFACTION AND RETENTION

12 APPENDICES

A: Charter School Overview

B: Benchmark Summary

C: Student Demographics

D: Fiscal Benchmarks Summary



CHARTER SCHOOL BACKGROUND

NEW ROOTS CHARTER SCHOOL

116 North Cayuga Street, Ithaca, NY | Grades: 9-12 | Ithaca City School District



MISSION

New Roots Charter School will prepare our diverse student body to meet the challenges of citizenship, work, and life-long learning in the 21st century. Our interdisciplinary academic program will feature hands-on, community-based learning that supports students in solving real-world problems. New Roots Charter School students will earn a Regents diploma and demonstrate readiness for higher education by earning college credit and creating a graduation portfolio that demonstrates that they have met or exceeded New York State learning standards. Our school community will create a model of secondary education that integrates best practices in sustainability education with those proven to support educational equity.

CURRENT CHARTER INFORMATION

Year Opened: 2009

Serves: 9th – 12th

Chartered Enrollment: 140

Charter Expires on: July 31, 2025

FUTURE CHARTER INFORMATION

Serves: 6th – 12th

Chartered Enrollment: 211

Charter Expiration July 31, 2030

NEW ROOTS CHARTER SCHOOL BOARD OF TRUSTEES¹

CHAIR

Dr. Jason Hamilton

VICE CHAIR

Catherine Thompson

TREASURER

Paul D. Wheeler

SECRETARY

Tanya Saunders

TRUSTEES

Dr. Thomas Shevory

Joseph M. Wilson

Millicent L. Clarke-Maynard

Dr. Peter Bardaglio

KEY DESIGN ELEMENTS

Education for sustainability as an integrated principle for applied disciplinary studies;



Small school design; and,



Community-based learning;



A college and life readiness curriculum.



1. Source: The Institute's board records at the time of report finalization.

"+" : This indicator is generally present.

"-" : This indicator is generally not present.

EXECUTIVE SUMMARY

FULL-TERM RENEWAL

The Charter Schools Institute (the “Institute”) recommends the SUNY Trustees’ Charter School Committee approve the Application for Charter Renewal of New Roots Charter School (“New Roots”) for a period of five years with authority to provide instruction to students in 6th through 12th grade in such configuration as set forth in its Application for Charter Renewal, with a projected total enrollment of 211 students. The Institute makes this recommendation as New Roots meets the requirements for renewal set forth in the Policies for Renewal of Not-For-Profit Charter School Education Corporations and Charter Schools Authorized by the Board of Trustees of the State University of New York (the “SUNY Renewal Policies”).²

REVISION REQUEST

New Roots is requesting an expansion to serve middle school grades in the next charter term. The school will begin with a small cohort of 25 6th – 8th grade students in its initial year, then grow to serve 51 middle school aged students. New Roots proposes to bring its effective elements of its high school program to a middle school program with focused efforts on small class sizes as well as a Montessori-influenced approach to teaching and learning. The school intends to modify its current rich project based learning program to the middle school level, which will offer many opportunities for students to engage in real life learning focused on building a sustainable planet. New Roots will implement curricula based on Clark Montessori, the nation’s first public Montessori school. The program will foster student-centered learning, hands-on and real life experiences, seminar discussions, and service integration. New Roots will support students through multi-grade classrooms and will build a three year curriculum cycle to ensure that students build toward high school learning standards with appropriate supports in place.

Given New Roots demonstration of effective practices and whole program improvement in its current, short charter term, the Institute recommends the SUNY Trustees approve the middle school program expansion request for New Roots, allowing the school to implement a Montessori-influenced multi-grade program ultimately serving 6th – 12th grade with a chartered enrollment of 211 students.

EXECUTIVE SUMMARY

New Roots is an academic success having demonstrated improvements in its overall academic program, results, financial position, and organizational capacity over the short charter term. Over the last three years, New Roots has fulfilled the conditions of its renewal in 2022 and also expanded its leadership team with the addition of new key roles necessary to meet the developmental needs of its teachers, as noted in previous Institute renewal evaluation reports.

Historically, the school has faced significant and vocal opposition from a subset of community members and financial setbacks due to delayed district payments. Over the current charter term, New Roots leaders and board members have successfully mitigated these challenges and secured meaningful community support from within the Ithaca City School District (“ICSD” or “the district”). Going forward, this improved relationship may contribute

². SUNY Renewal Policies (p. 14) are available on the [Institute’s website](#).

EXECUTIVE SUMMARY

to additional programmatic collaboration and possible new avenues for student recruitment and enrollment. The school has embarked on an initiative to codify and streamline its internal practices and systems to increase efficiency and ensure its sustainability outside of its founding team.

At the school's previous renewal, the SUNY Trustees granted a Short-Term Renewal of three years with conditions for the school due to poor fiscal health, a lack of alumni tracking, and deficits in its academic program. The Trustees approved the most recent renewal with the following conditions:

- Report to the Institute updates to its academic program and instructional leadership team including any metrics and goals set by the board and school;
- Conduct an annual external review of the school program and provide the Institute with the external provider's report;
- Remain within its 80% enrollment collar each year of the short charter term; and,
- Improve its alumni tracking systems and report its results to the Institute each year.

In response to each of the above conditions, the Institute found effective practices and systems in place at the time of the renewal visit. The school underwent an effective transformation to ensure it has a strong academic program in place with increased instructional leadership. The school partnered with the Green Schools Network to have an annual program review with clear strengths and improvement areas outlined for development. The school focused its recruitment efforts and oversight of its budget to ensure the school model is sustainable with increased fundraising that allows the school to supplement its budget. The school hired a college and career coordinator, who is tasked with tracking alumni, and has built effective systems for tracking alumni and is working to reconnect with early graduates of the program to understand their successes after leaving high school.

The school met each of the conditions and reported in a timely fashion to the Institute. The Institute notes that New Roots demonstrates much closer alignment and effectiveness with implementing its systems as outlined by the Renewal Benchmarks.

FINDINGS & INFORMATION

Is the charter an academic success?

New Roots is an academic success having met or come close to meeting its Accountability Plan goals over the short charter term. Having expanded its instructional leadership team during the charter term, the school demonstrates clearer and more effective supports for teachers. Leaders prioritize building a cohesive academic program, and the curricular programs feature rich interdisciplinary opportunities for students to apply knowledge and skills to real world applications. The school demonstrates success in the following ways:

- The school posted high four year graduation rates over the term. In every year from 2021-22 through 2023-24, New Roots exceeded the absolute target of 75% by at least six percentage points.
- Over the charter term, New Roots increased the percentage of students matriculating into college after graduation. From 2021-22 to 2023-24, the school increased its college matriculation rate by 27 percentage points.

EXECUTIVE SUMMARY

- The school's students posted high achievement in English language arts ("ELA") and mathematics in 2023-24. That year, 75% of the 2020 Total Cohort scored at least at Level 4 on the English Regents exam indicating performance beyond basic proficiency and fully meeting Common Core expectations. In mathematics, 88% of 2020 Total Cohort members who sat for a mathematics Regents exam scored at proficient or above.
- New Roots also expanded its array of courses offered for college credit through the school's partnership with Tompkins-Cortland Community College's CollegeNow program, which now includes 20 classes for college credit at no cost to students. Last year's graduating students averaged 14.2 credits earned.

Is the charter an effective, viable organization?

New Roots is an effective, viable organization. Over the charter term, the board expanded the school leadership team to include two additional staff members to support teachers. The school establishes a communal culture, which helps support staff member retention due to the strong adult culture built by leadership. After financial difficulty in the previous charter term, the school improved its financial position ensuring it has necessary resources in place for teachers.

Throughout the charter term, the board focused on improving the school's financial position, expanding the school's leadership, and exploring root causes of under performance areas. The board improved its oversight and governance skills over the charter term. The board engaged in formal board training to support its improvement efforts.

Is the charter fiscally sound³?

New Roots is fiscally sound based on the Institute's review of the renewal documentation. The education corporation established a sound budget method formulating reasonable and achievable projections and future fiscal goals. The education corporation's finance team meets monthly with the board to monitor variances and discuss results. New Roots maintained adequate enrollment throughout the current charter term to cover its expenses, which was a condition of its previous renewal. New Roots had a significant internal control deficiency in the 2023-24 fiscal year that required an auditor adjustment, which was acknowledged and approved by the school's board and leadership. The deficiency related to inaccurate or incomplete reconciliation of the account balances at the end of the 2023-24 school year. The education corporation maintains a separate dissolution account with the appropriate amounts as required by the charter agreement. New Roots plans to research and resolve old accounts receivable balances and perform periodic reviews of the balances.

New Roots Charter School demonstrated strong financial performance during the current charter term, with net assets (\$1.2 million) and cash (4.8 months on hand) reserves growing each year. New Roots maintained adequate teacher-to-student ratios and adjusted accordingly to reflect enrollment fluctuations. The education corporation prioritized spending on the creation of new curriculum and teacher salaries.

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

EXECUTIVE SUMMARY

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

New Roots’ plans for a future charter term are reasonable, feasible, and achievable. The school plans to explore more career readiness programs and supports to build out the school’s career readiness program. It will continue to build upon the improvements made to the academic program over the charter term that led to improved results for students. As mentioned in the Revision Request section above, New Roots will also begin serving 6th – 8th grade students, if approved.

New Roots proposes a reasonable and achievable budget plan for the next charter term. The education corporation plans to continue investing in student recruitment during the proposed charter term. The Institute has confidence New Roots will continue to be fiscally sound in the next charter term.

Given the current leased facility size and structure, the addition of the middle school program may possibly be accommodated within the current space as currently occupied. The school Leaders are considering two alternatives should demand exceed capacity with the expansion of 6th – 8th grade. The first option is the purchase of the currently leased facility, which would provide use of more space within the building. Alternatively, an additional site for middle school expansion has also been identified.

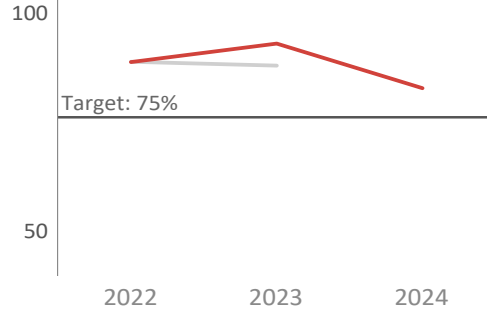


ACADEMIC PERFORMANCE

NEW ROOTS CHARTER SCHOOL

HIGH SCHOOL GRADUATION RATE

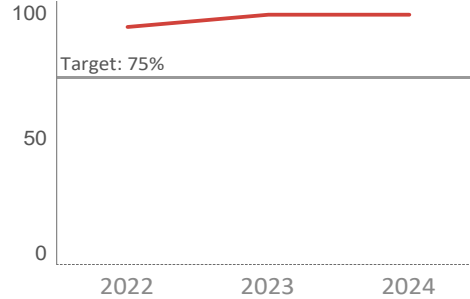
Comparative Measure: Graduation Rate. Each year, the percentage of **the charter school's students graduating** after completion of their fourth year will exceed the **District**.



Year	District %	Charter %
2022	87.3	87.2
2023	86.4	91.3
2024		81.5

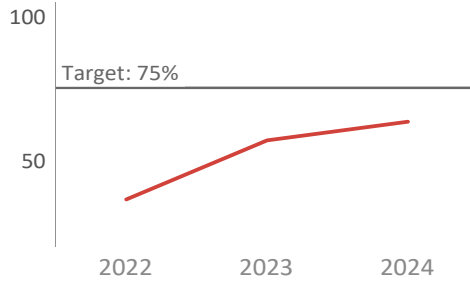
COLLEGE PREPARATION AND ATTAINMENT

College Preparation Measure: Each year, 75 percent of **graduates** will demonstrate college preparation through one or more indicators including passing an AP exam or earning an advanced diploma.



Year	Graduates	College Prep %
2022	41	95.1
2023	21	100.0
2024	22	100.0

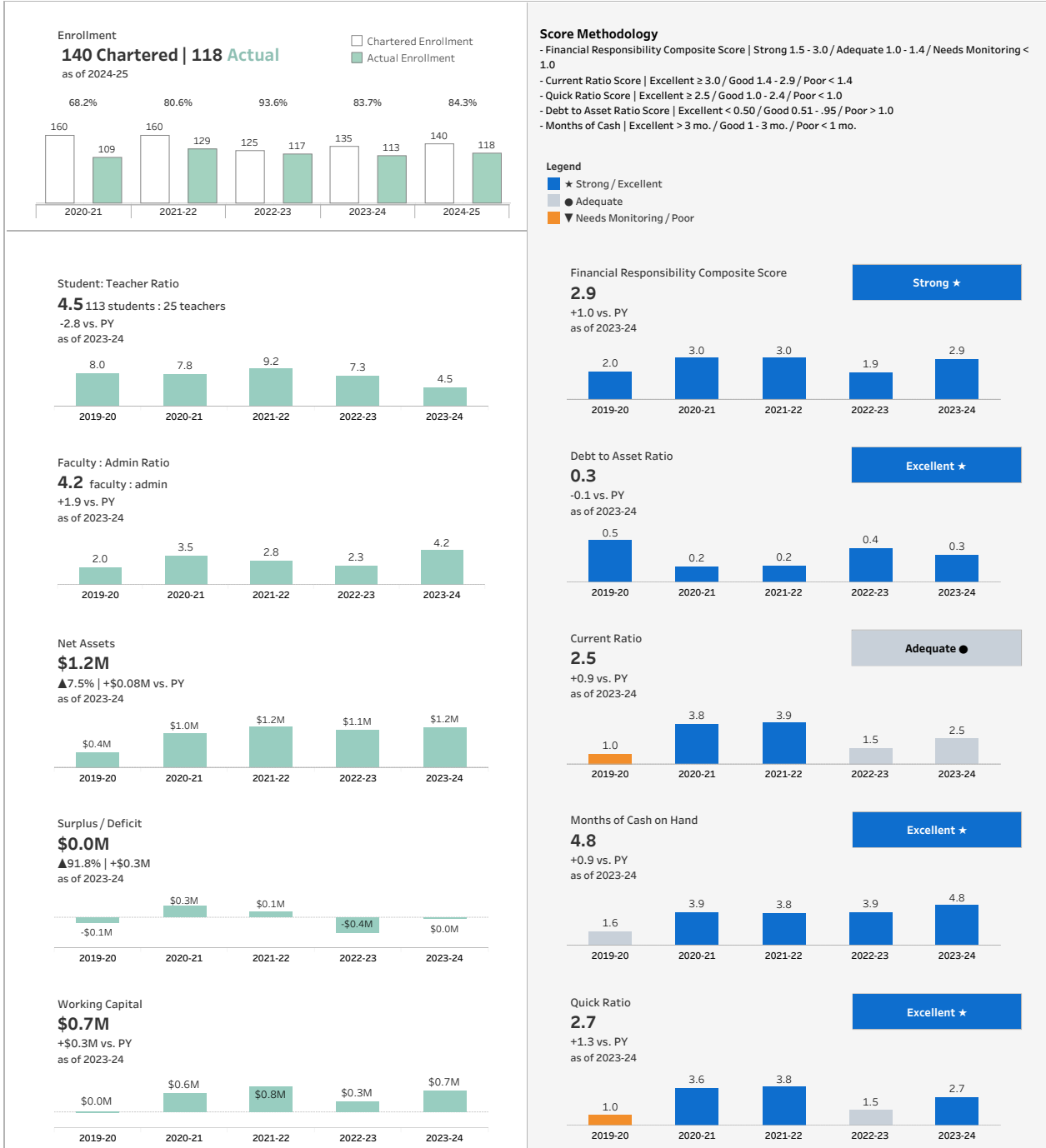
College Attainment Measure: Matriculation into College. Each year, 75 percent of **graduating students** will enroll in a college or university.



Year	Grad N	Matriculation %
2022	41	36.6
2023	21	57.1
2024	22	63.6

* High school outcome data for 2023-24 is pending final validation by the Institute and education corporation subsequent to the release of the state's graduation report card data.

NEW ROOTS CHARTER SCHOOL



COMPLIANCE REPORTING



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

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

Teacher Certification

The New York State Charter Schools Act of 1998 (the “Act”) allows charters to hire up to 15 uncertified lead teachers contingent upon those teachers meeting certain requirements including: two years of Teach for America experience; three years of teaching experience; status as a higher education professor; exceptional experience in a subject; or, teaching science, technology, engineering, and mathematics or career and technical education courses.

New Roots seeks certified teachers in its hiring practices. The principal establishes a certification plan and timeline for each uncertified teacher and monitors their progress toward certification as part of the performance review process. New Roots provides support documenting professional development hours to ensure certifications remain current.

At New Roots, five out of the 13 teachers are uncertified, which is within the allowable limit under the Act. The five uncertified teachers meet the additional qualifications under the Act.

COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

To report on parent satisfaction with the school’s program, the Institute used satisfaction survey data, information gathered from a focus group of parents representing a cross section of students, and data regarding persistence in enrollment.

Parent Survey Data

The Institute compiled data from the school’s annual family survey. The school conducts at least an annual survey to gauge family satisfaction. In 2023-24, 39% of families responded to the survey. Of those respondents, 99% indicated satisfaction with the school. The Institute recognizes that the low response rate may not be representative of the whole community.

Parent Focus Group

The Institute asks all charters facing renewal to convene a representative set of parents for a focus group discussion. A representative set includes parents of students in attendance at the charter for multiple years, parents of students new to the charter, parents of students receiving general education services, parents of students with special needs, and parents of ELLs. The 12 parents in attendance at the focus group indicated unanimous satisfaction with the school, particularly the level of attention paid to each individual student. Participants spoke of the trusting relationships between families and teachers and how they maintain close contact via frequent emails, phone calls, and the ParentSquare app. These channels keep families well informed about their children’s performance and ongoing needs, both academically and social-emotionally. Parents find staff members open to feedback and suggestions and appreciate the efforts to meet students’ needs and interests. Several focus group participants praised the school’s scheduling approach, which enables students to take fewer classes with enhanced focus, manage fewer transitions, and provide more opportunities for practical application. Many participants highlighted New Roots’ inclusive and nurturing environment as a much-needed respite for students who had encountered substantial challenges in previous educational settings.

Public Comments

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

The ICSD held its required hearing on the renewal application for New Roots on December 12, 2024. Two members of the district board of education stated they appreciate the work New Roots has done for its students and highlighted that some students choose the school for its smaller class sizes and project-based learning model. The board mentioned it wants to continue discussions and stay informed about the school’s current enrollment, grades served, and graduation rates. At the district’s hearing, no other members of the public spoke in support of or in opposition to the application.

A current teacher wrote a letter in support of the application sharing how the school is a place where students are seen and heard, where they can build community connections, and where sustainability and social justice are pursued through capstone projects. The current school nurse also wrote a letter in support of the application stating the district

COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

placed them at New Roots beginning in 2013 and their time at New Roots has been some of the best years of their career because they see students thrive on friendships formed and an environment that allows them to be themselves. The Institute received six letters of support from parents whose students attend or attended New Roots. The parents share that New Roots provides a caring community for their children. They appreciate the small class sizes and the school's ability to provide individual supports, opportunities, connections, and guidance tailored to their children's specific interests. The parents also highlight the school's community-based learning model, field trips, extracurricular offerings, and hands-on experiences that are integrated into the curriculum. Parents of students now in college feel New Roots prepared them for success in college and in making a positive impact on the world. Three parents of current elementary students wrote to express their interest in and support for New Roots' proposed middle school program. The Institute received 29 letters of support from the school's community partners such as the City of Ithaca Department of Planning and Development, Cloud Institute for Sustainability Education, Green Schools National Network, Tompkins-Cortland Community College, and many other organizations. The letters discuss how the New Roots learning environment embraces the diversity of the Ithaca student population and empowers students as they strive and thrive academically and personally. The partners state that New Roots prepares the students for leadership in service, informed citizenship, and agility in gainful employment.

Enrollment and Retention

New Roots makes good faith efforts to meet its enrollment and retention targets. The school meets its enrollment targets for economically disadvantaged students and students with disabilities. During the visit, the Institute reviewed the school's efforts for recruiting English language learners ("ELLs"), and the school reflected on ways to improve its recruitment strategies to include more targeted outreach including translating materials into other languages. Although the school does not meet its retention targets for students with disabilities and economically disadvantaged students, the retention rates for those subgroups are commensurate with the school's overall persistence rate.

Persistence in Enrollment An additional indicator of parent satisfaction is persistence in enrollment. In 2023-24, 79% of New Roots students returned from the previous year. Student persistence data from previous years of the charter term is available in the student demographics section of the report.

The Institute derived the statistical information on persistence in enrollment from its database. No comparative data from the NYCDOE or the New York State Education Department ("NYSED") is available to the Institute to provide either district or statewide context.

COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

New Roots Charter School's Enrollment and Retention Status: 2023-24		Target	Charter
enrollment	economically disadvantaged	30.7	54.9
	English language learners	2.1	0.9
	students with disabilities	7.9	15.9
retention	economically disadvantaged	91.7	81.8
	English language learners	95.4	100.0
	students with disabilities	92.4	78.6

New Roots

Ax

APPENDICES

PAGES Ax 1-11

CO ^A CHARTER OVERVIEW	BS ^B BENCHMARK SUMMARY	SD ^C STUDENT DEMOGRAPHICS	FB ^D FISCAL BENCHMARK
PAGE Ax 1	PAGE Ax 2	PAGE Ax 7	PAGE Ax 9



CHARTER CHARACTERISTICS

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT ¹	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2022-23	125	117	94%	9-12
2023-24	135	117	87%	9-12
2024-25	140	118	84%	9-12

CHARTER SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2009-10	First Year Visit	March 25, 2010
2010-11	Evaluation Visit	May 17 – 19, 2011
2013-14	Initial Renewal	October 8 – 9, 2013
2014-15	Evaluation Visit	May 12 – 13, 2015
2015-16	Evaluation Visit	April 20, 2016
2016-17	Subsequent Renewal	September 21 – 22, 2016
2020-21	Evaluation Visit	April 21 – 22, 2021
2021-22	Subsequent Renewal	November 3 – 4, 2021
2021-22	Evaluation Visit	May 26, 2022
2023-24	Evaluation Visit	April 25, 2024
2024-25	Subsequent Renewal	October 10 – 11, 2024

CONDUCT OF THE RENEWAL REVIEW

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
October 10 – 11, 2024	Heather Wendling	External Consultant
	Andrew Kile	Director of School Evaluation

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

BENCHMARK SUMMARY

ACADEMIC ACHIEVEMENT

New Roots met or came close to meeting its key academic Accountability Plan goals during its subsequent three year term. The school consistently posts high graduation rates that are comparable to its local district. Notably in 2023-24, 100% of the school's graduates demonstrated college preparation by passing a college level course. The school came close to meeting its subject area goals and remains in good standing according to the state's Every Student Succeeds Act ("ESSA") accountability system.

New Roots met its graduation goal over the term. From 2021-22 through 2023-24, the school's students graduated at rates that exceeded the absolute target of 75% every year. In 2021-22 and 2022-23, New Roots posted four year graduation rates that met or exceeded the Ithaca City School District ("ICSD" or the "district") results. In 2023-24, with 81% of the 2020 Cohort graduating after four years, the school's performance was five percentage points lower than the most recently available results for the district. Importantly, while the majority of New Roots' students district of residence is the local district, the school enrolls students from at least 15 other districts each year. Due to this enrollment pattern, a direct comparison to the local district is not entirely suitable. Notably, the school's first and second year Cohort members consistently earn sufficient credit to be promoted to the next grade at high rates, a key leading indicator of future high graduation outcomes.

New Roots came close to meeting its college preparation goal throughout the three year charter term. From 2021-22 through 2023-24, the school's graduates demonstrated college preparation through multiple methods such as achieving the college and career readiness benchmark on the SAT, earning a Regents diploma with advanced designation, and passing a college level course offered through partnership with Tompkins Cortland Community College or SUNY College of Environmental Science and Forestry. Notably, 100% of the school's graduates demonstrated college preparation through at least one of these methods in 2022-23 and 2023-24. Over the term, New Roots graduates matriculated into two and four year college programs at rates that fell below the target of 75% each year. However, the school has incrementally increased the college matriculation rate and came close to the target in 2023-24 with 64% of graduates enrolling in a program in the fall following graduation. From 2021-22 to 2023-24, the school increased the proportion of its graduates matriculating into college by 27 percentage points. During this charter term, the school hired a college and career program coordinator who is charged with building the school's alumni tracking systems. As part of this work, the school is gathering information about students' post-secondary choices. This information will better inform the school's efforts to encourage college enrollment while also enhancing its program to support students making career options.

ASSESSMENT

New Roots implements an established and multifaceted assessment system to improve teachers' instructional effectiveness and provide a well-rounded view of students' progress and achievement. In every year of this charter term, the school has utilized the nationally normed NWEA MAP ("MAP") assessment three times annually to gauge students' skills in reading and mathematics and identify areas where additional support is needed. Over time, New Roots has refined its assessment strategies in response to the skills gaps common among many incoming students. For example, the school has developed a diagnostic assessment that measures

proficiency and pre-requisite skills to help place students into the appropriate mathematics course. Throughout the school year, teachers regularly use formative assessment techniques during classroom instruction, such as quizzes and exit tickets, and administer summative assessments including quarterly tests aligned to curriculum unit and Regent’s exams format and standards. Beyond these traditional assessments, New Roots also places a special emphasis on project-based learning that provides innovative ways for students to demonstrate learning and mastery. Each year, students complete interdisciplinary and performance-based anchor projects and compile work samples in individual portfolios that highlight their progress. In addition, seniors complete a team capstone project that engages students in identifying, researching, and responding to a global or local sustainability issue. New Roots has centralized students’ academic, attendance, communication, and behavioral data in the SchoolRunner online platform, which is easily accessible to staff members, students, families, and board members. The school ensures families stay informed about their students’ progress and growth through monthly and quarterly reports, student-led conferences three times per year, and ongoing informal communication.

CURRICULUM

New Roots has an innovative curricular framework aligned to New York State Standards as well as Education for Sustainability (“EFS”) performance indicators that supports teachers with instructional planning and promotes coherence and continuity across grade levels. The school draws from a mixture of published, open-source, and internally developed curricula to provide teachers with a comprehensive suite of materials for each course, including scope and sequence documents, pacing calendars, unit plans, approved texts, and lesson plans from previous years for adaptation to current students’ needs. Based on these documents and a curriculum dashboard that illustrates the pacing and interdisciplinary connections across content areas, teachers know what to teach and when to teach it. The school’s curricular goals are further enhanced through fieldwork and project-based learning that allow students to apply classroom content to local issues. Grade-level anchor projects supplement the interdisciplinary nature of the school’s curricula. While such projects were largely teacher-driven in previous charter terms, the school recently codified project guides that provide parameters and guidance for their implementation to norm expectations around rigor. Students access Career and Technical Education (“CTE”) opportunities through New Roots’ required four-year college and career success seminar course and can earn numerous college credits in 11th and 12th grade through dual enrollment courses offered at no cost through the school’s partnership with Tompkins Cortland Community College.

PEDAGOGY

High quality instruction is evident throughout New Roots. Teachers deliver purposeful lessons that align to both state standards and EFS standards. Teachers weave in interdisciplinary content in lessons. For example, in English courses, students study specific strategies to support reading comprehension while reading texts focused on the environmental impacts of their daily choices. Teachers consistently present learning objectives aligned to the curricular framework. Teachers focus on planning differentiated activities to address the array of learning needs within their classes and effectively implement them during lessons. Most teachers facilitate robust discourse and utilize a variety of checks for understanding techniques, including open ended questions, that encourage critical thinking and connections across concepts and content. However, in some classes, teachers do not consistently insist on full participation, which impedes the ability to gauge whole class mastery or understanding.

Teachers at New Roots consistently challenge students with activities that deepen understanding and higher order thinking skills. Teachers present high level questions with an interdisciplinary focus that allows students to make deep connections between concepts and content areas. Teachers also incorporate many opportunities for students to discuss concepts in small groups and in pairs. In the majority of lessons, students apply knowledge to real life situations and take academic risks to share points of view and understand others' perspectives, on both local and international scales. The school recognizes that mathematics instruction thus far has been more rote, and leaders are working with the mathematics department to embed more frequent real world application opportunities. New Roots teachers establish clear routines and behavioral expectations to maintain classroom environments where students feel safe and have accommodations as needed. Staff members and students consistently display warm and respectful behavior toward each other. However, in some lessons, teachers miss opportunities to maximize teaching time and extend learning opportunities for students by allowing them to set the pace of lesson activities.

INSTRUCTIONAL LEADERSHIP

New Roots has expanded its instructional leadership team to enhance the school's capacity to support teachers through comprehensive observation and feedback cycles and professional development activities. This year, the school officially added a third instructional leadership position and internally promoted an experienced teacher into its inaugural EfS coordinator role. This position complements the school principal and a part-time instructional practice coordinator who each possess deep institutional knowledge of the school's mission and approach to pedagogical development, and fulfill distinct functions aligned to New Roots' fully homegrown evaluative framework for teachers. The latter consists of five dimensions of professional practice: curriculum and instructional planning, classroom practices, alignment to school vision and mission, student performance and engagement, and intellectual rigor and challenge. Teachers set personal growth goals aligned to this framework and capture evidence of their progress in individual digital portfolios over the course of each school year.

The school's practice-embedded coaching ("PEC") approach includes robust cycles of goal setting, observation, feedback, and data collection, as well as iterative growth routines that support individual and schoolwide professional development. These routines focus on improving lesson planning, preparation, and the execution of high quality, interdisciplinary, and place-based learning strategies. PEC practices include regular classroom observations that range from in-depth, 80 minute transcriptions of entire lessons to daily check ins with informal feedback on strong practices and probes to drive reflections and improvements. Leaders also facilitate opportunities for teachers to learn from their peers through classroom intervisitations. As part of an overall initiative to codify the school's practices and systems to ensure their continuity, leaders have established and communicated more comprehensive expectations for instructional planning, such as the required level of overall detail and specific differentiation techniques present in lesson plans. Leaders support teachers' day to day instructional planning by collaborating during lesson design and providing written feedback on plans prior to their delivery. Collectively, these efforts produce greater consistency across teachers' planning documents than in previous years.

In addition to individualized PEC, New Roots' instructional leaders also provide schoolwide pre-service and ongoing professional development several times per month. Institute feedback, EfS curricular standards, and staff-identified needs such as optimizing the use of assessment data, inform annual professional development

topic selections, scopes, and sequencing. The school's principal holds teachers accountable for quality instruction by completing formal evaluations twice per year. This protocol considers a comprehensive and holistic array of data including PEC supports, observations, and student performance results.

AT-RISK PROGRAM

New Roots meets the educational needs of at-risk students. The school implements compliant practices to identify students with disabilities and English language learners ("ELLs"). During the charter term, the school developed more systematic practices to identify students struggling academically. The school began using MAP as a diagnostic and benchmarking tool to understand specific needs and interventions for students. The school has a robust process for focusing on students struggling academically, as evidenced by weekly content meetings that focus on specific remediation and supports for students. The school provides a variety of supports including an academic intervention space, which allows students to focus in a private environment as needed. In weekly meetings, teachers and leaders review implemented interventions and discuss student progress and next steps. These meetings include a comprehensive analysis of students' specific strengths, challenges, and interests and allow teachers to troubleshoot additional interventions. Through these meetings, special education teachers provide professional development to general education teachers by sharing specific strategies and supports to enhance tier 1 instruction as well as other strategies for supporting students with specific needs.

The school's special education department is focused on providing an individualized approach that meets the needs of each student. The primary team consists of the dean of students, a part time student services coordinator, a special education teacher, and the school social worker. The school provides students with disabilities with consultant teacher, resource room, and counseling services, and contracts with students' sending districts for related services. In addition to indirect consultant teacher services, the school provides a learning lab, resource room, and academic intervention space, all of which provide effective services in supporting students' academic needs and accommodations. At the time of the renewal visit, New Roots did not have any enrolled ELLs, but had a clear plan in place to provide supports for English language acquisition if an ELL student were to enroll. The school will focus on improving its recruitment strategies and processes to attract ELLs in the coming charter term.

ORGANIZATIONAL CAPACITY

New Roots expanded its leadership and administrative structures during the charter term to work effectively to deliver the educational program. During the charter term, the instructional leadership expanded to include three members to provide support to developing the quality and consistency of pedagogy across the school. In addition, the school has a stable and effective operations team that sets clear policies and practices that allow instructional leaders to focus on academics. The operations team consists of the operations manager, director of community engagement, executive projects coordinator, and a college and career program coordinator. Together, these team members ensure the school functions seamlessly from an operations perspective and add capacity to the school to delegate responsibilities. For example, with the college and career program coordinator, hired during the 2023-24 school year, the school has a team member who will support students pursuing higher education, build out a career-focused program, and track graduates in their postsecondary success. With the addition of the instructional coach and the EFS coordinator, the principal has an academic team to delegate responsibilities of coaching and support for teachers.

In the previous charter term and through this term, New Roots has bolstered its efforts in fundraising and other income streams. In doing so, the school has maintained the necessary funds to manage a budget that includes more leadership roles. The school leadership, with board support, manages budgets well to provide a high quality program. While the school has relied on fundraising in every year of the current charter term, the board and school leadership establish conservative budgets and are reflective on how to implement the school's programming under various contingencies.

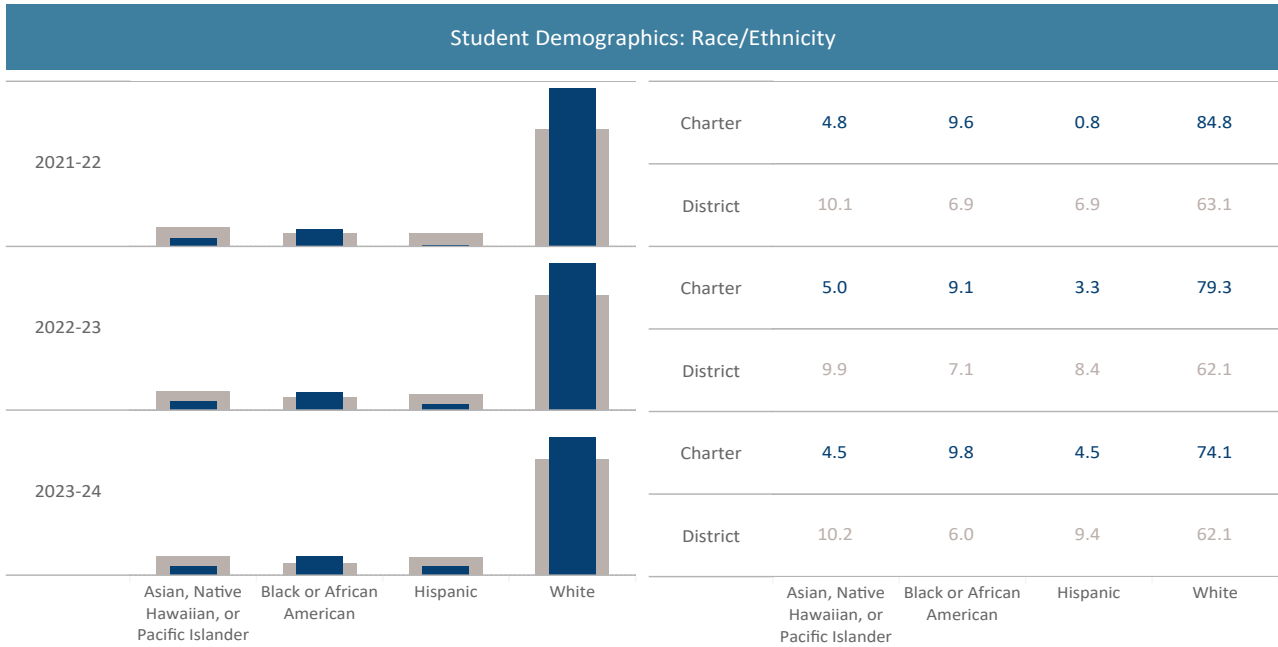
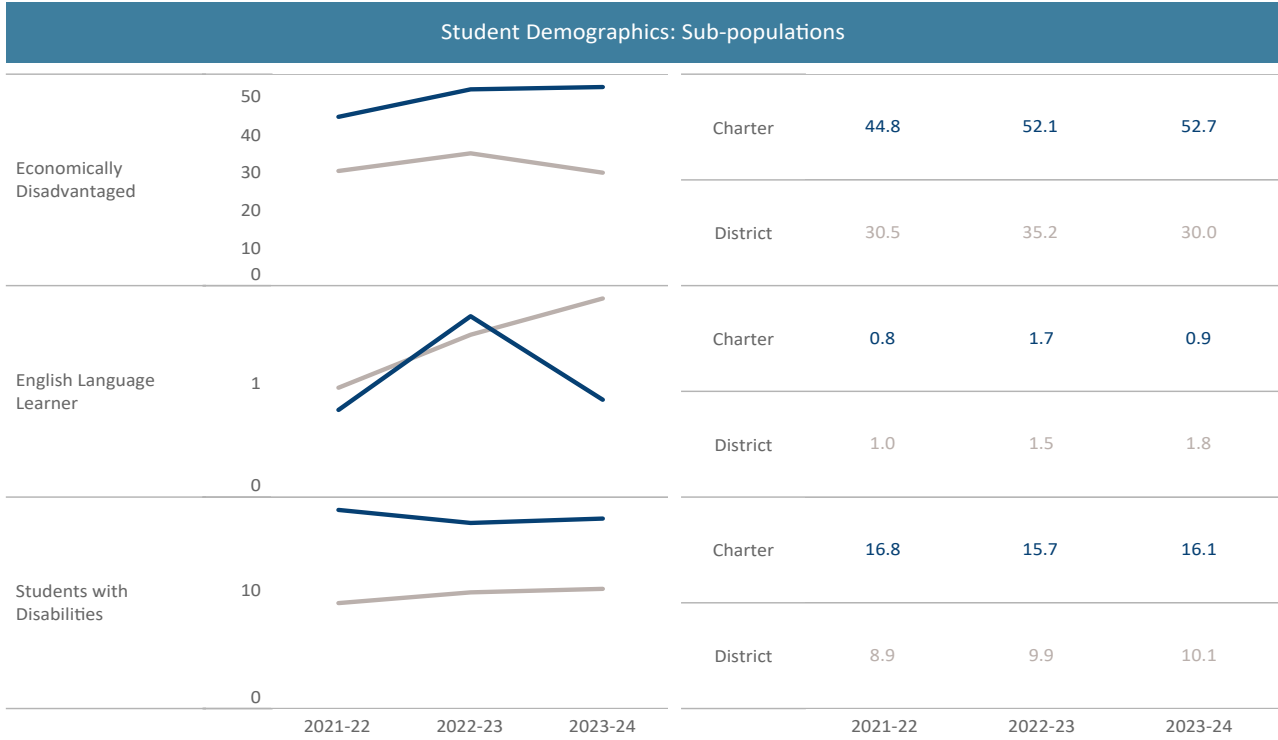
BOARD OVERSIGHT & GOVERNANCE

The New Roots board of trustees works effectively to achieve the school's Accountability Plan goals and, over the short charter term, worked to ensure it met the conditions placed on the school's previous renewal. The board made improvements to its governance and oversight skills over the charter term that have resulted in improved functions at the school both academically and organizationally. Board members cite leaders' improved collection and presentation of multiple data streams as a driving factor in their ability to ask thoughtful questions that strengthen governance and their deployment of resources. Following the school's last renewal, the board set clear goals for the principal to bolster schoolwide data systems; organize the curricular programs and hiring process to better align with the mission of sustainability and social justice; and, strengthen the school's enrollment, external communication, and development of diversified funding streams. The board helped to increase capacity by expanding the instructional leadership team to include a dedicated instructional coach and an EFS coordinator, which allows the principal to focus on priorities outside of teacher development.

The board's long-term plan is to focus on the financial sustainability of the educational program, succession planning for both school and board leadership, and relationship development with the districts from which New Roots receives students. The clarified reporting, goal setting, and progress monitoring structures the board implemented in the current charter term facilitated a strong alignment between teachers, leaders, and board members in the vision for the future of the school. With renewal, New Roots is requesting a middle school program addition after the board and school leaders thoughtfully discussed the expansion and the vision for the program. The board is eager to attract new students who would benefit from the New Roots approach before they become socially embedded at other district schools. The board and principal also indicate that the addition of middle school grades would address the school's enrollment challenges.

New Roots Charter School

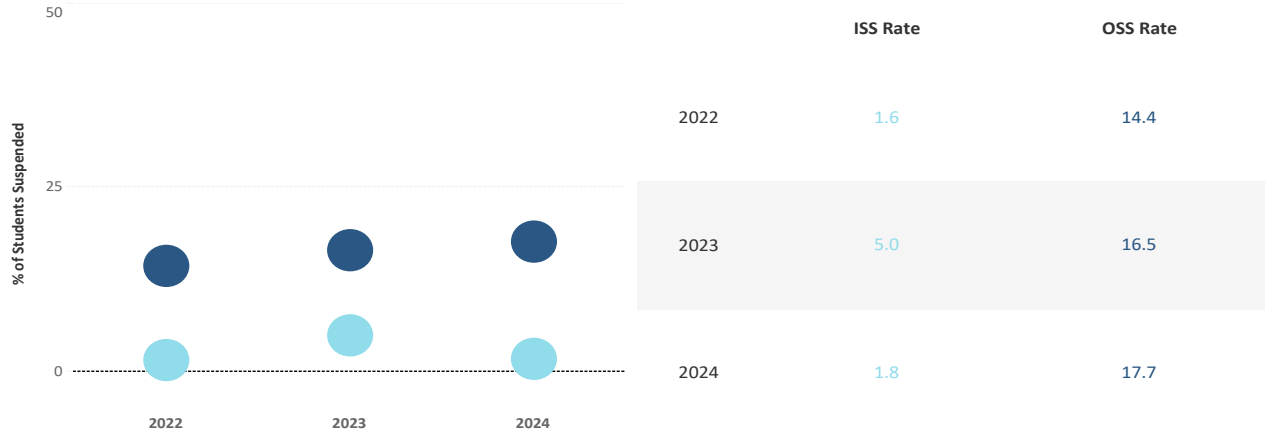
Ithaca City School District



* Source: Data in these charts reflect information available from BEDS Day and reported through the NYSED. However, due to a reporting error, the school reported some of its subgroup enrollment data to the Institute, which the Institute verified. At the time of this report, the school is working closely with the NYSED to correct the enrollment information.



New Roots Charter School



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

	2022	2023	2024
	0	0	1

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

FISCAL BENCHMARKS SUMMARY



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

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

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

DOES THE EDUCATION CORPORATION MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

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

INDICATORS	EVIDENT?
The education corporation has a history of sound fiscal policies, procedures, and practices, and appropriate internal controls.	+
The most recent audit report was free of any significant deficiencies or material weaknesses in internal controls.	-

"+" : This indicator is generally present.

"-" : This indicator is generally not present.

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

"N/A" : This indicator is not applicable.



INDICATORS	EVIDENT?
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The education corporation reviews and updates its Financial Policies and Procedures Manual (“FPPM”), which covers the charter, on a regular basis. The most recent review of the FPPM is found in the next column. The Institute recommends, as a best practice, that the education corporation review and update its FPPM on an annual basis to ensure current operating systems are reflected.

**AUGUST
2024**

As previously noted, New Roots had a significant internal controls deficiency in the 2023-24 fiscal year that required an auditor adjustment. The board and school leadership accepted the audit findings and established greater oversight through monthly and end of year reconciliation processes. The school will also research and resolve old accounts receivable balances and perform periodic reviews. The Institute is confident in the school’s ability to resolve the matter in the next year.

DOES THE EDUCATION CORPORATION COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

The education corporation has complied with financial reporting requirements by providing the SUNY Trustees and NYSED with required financial reports that are on time, complete, and follow generally accepted accounting principles. The following reports will have generally been filed in a timely, accurate, and complete manner:

INDICATORS	EVIDENT?
Annual financial statement audit reports, including federal Single Audit report, if applicable.	+
Annual budgets.	+
Un-audited quarterly reports of income, expenses, and enrollment.	+
Bi-monthly enrollment reports to the sending districts and, if applicable, to NYSED including proper documentation regarding the level of special education services provided to students.	N/A
Grant expenditure reports.	N/A



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

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

INDICATORS	EVIDENT?
The education corporation maintains sufficient cash on hand to pay current bills and those that are due shortly.	+
The education corporation maintains adequate liquid reserves to fund expenses in the event of income loss (generally 30 days).	+
The education corporation prepares and monitors cash flow projections.	+
If the education corporation includes philanthropy in its budget, it monitors progress toward its development goals on a periodic basis.	N/A
If necessary, the education corporation pursues district state aid intercepts with NYSED to ensure adequate per pupil funding.	+
The education corporation accumulates unrestricted net assets that are equal to or exceed two percent of the charter’s operating budget for the upcoming year.	+
The education corporation is in compliance with all loan covenants.	+



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