

# THE SUNY CHARTER SCHOOLS INSTITUTE

*RENEWAL RECOMMENDATION REPORT  
SUCCESS ACADEMY CHARTER SCHOOLS -  
NYC'S AUTHORITY TO OPERATE:*

*SUCCESS ACADEMY CHARTER SCHOOL -  
BRONX 1*

*SUCCESS ACADEMY CHARTER SCHOOL -  
BRONX 2*

*SUCCESS ACADEMY CHARTER SCHOOL -  
HARLEM 5*

*REPORT DATE: APRIL 2, 2025  
RENEWAL REVIEW: JULY 31, 2024*



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

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## EDUCATION CORPORATION BACKGROUND

# SUCCESS ACADEMY CHARTER SCHOOLS - NYC



### MISSION

*To provide students in New York City with an exceptionally high quality education that gives them the knowledge, skills, character, and disposition to meet and exceed New York State Common Core Learning Standards, and the resources to lead and succeed in school, college, and a competitive global economy.*

*Success Academy Charter Schools – New York City seek to provide this exceptionally high quality education to all of their students, including English language learners and students with special education needs, irrespective of socioeconomic, racial, ethnic, and/or other status.*

### EDUCATION CORPORATION BACKGROUND

Success Academy Charter Schools – New York City (“SACS NYC” or the “education corporation”), a not-for-profit charter school education corporation, is currently authorized to operate 41 charter schools, 38 of which are open and operating. SACS NYC partners with the charter management organization Success Academy Charter Schools, Inc. (“Success Academy” or the “network”), a Delaware not-for-profit corporation based in New York City, which serves the 41 schools operated by SACS NYC. By contract, Success Academy provides the schools with academic, operational, finance, legal, and back office assistance. The schools use the network’s curricular and assessment materials, all of which the network curriculum teams purchase and design. The network is also responsible for managing and evaluating the performance of each instructional leader with network managing directors serving in supervisory roles for principals. Each SACS NYC school implements an academic program consistent with all other SACS NYC charters, all of which are high performing.

This report covers the renewal for Success Academy Charter School - Bronx 1 (“Success Bronx 1”), Success Academy Charter School - Bronx 2 (“Success Bronx 2”), and Success Academy Charter School - Harlem 5 (“Success Harlem 5”).

### CURRENT EDUCATION CORPORATION SNAPSHOT

First School Opened:  
2006

Total Number of Charters:  
38

Number of Students Served:  
23, 917

### PROPOSED FUTURE EDUCATION CORPORATION SNAPSHOT

Serves: Kindergarten – 12<sup>th</sup>

Total Number of Charters:  
38

Proposed Future Charter Enrollment:  
27,159

Information about each charter is found on the following page.

## EDUCATION CORPORATION BACKGROUND

### Success Academy Charter School –

#### Bronx 1



Opening Year: 2010

**Current Enrollment/Grades: 406 | Kindergarten – 7<sup>th</sup>**

**Future Enrollment/Grades: 780 | Kindergarten – 8<sup>th</sup>**

Success Bronx 1 | 339 Morris Avenue, 2<sup>nd</sup> Floor, Bronx, New York | CSD\* 7 | Grades: K-7 | Mott Haven

### Success Academy Charter School –

#### Bronx 2



Opening Year: 2010

**Current Enrollment/Grades: 934 | Kindergarten – 8<sup>th</sup>**

**Future Enrollment/Grades: 995 | Kindergarten – 8<sup>th</sup>**

Success Bronx 2 Elementary | 450 Saint Pauls Place, 5<sup>th</sup> Floor, Bronx, New York | CSD 9 | Grades: K-4 | Claremont Village

Success Bronx 2 Middle | 270 East 167<sup>th</sup> Street, 2<sup>nd</sup> Floor, Bronx, New York | CSD 9 | Grades: 5-8 | Claremont

### Success Academy Charter School –

#### Harlem 5



Opening Year: 2010

**Current Enrollment/Grades: 748 | Kindergarten – 8<sup>th</sup>**

**Future Enrollment/Grades: 758 | Kindergarten – 8<sup>th</sup>**

Success Harlem 5 Elementary | 301 West 140<sup>th</sup> Street, 3<sup>rd</sup> Floor, New York, New York | CSD 5 | Grades: K-4 | Harlem

Success Harlem North Central Middle | 175 West 134<sup>th</sup> Street, 3<sup>rd</sup> Floor, New York, New York | CSD 5 | Grades: 5-8 | Harlem

\* New York City Community School District (“CSD”)

Please note, under the Act, each charter school is permitted to educate students from Kindergarten – 12<sup>th</sup> grade upon authorizer approval. Each charter school may have multiple facilities or sites to offer their approved grade configuration as long as each charter school does not educate students of the same grade level in more than one site.



## EDUCATION CORPORATION BACKGROUND

### SUCCESS ACADEMY CHARTER SCHOOLS - NYC BOARD OF TRUSTEES

CHAIR	TRUSTEES	
Lorenzo Smith III	Derrell Bradford	Ripan S. Kadakia
TREASURER	Aaron Kinnari	Ramin Beheshti
Scott Friedman	Samuel Cole	Regina Goldman Krumholz
SECRETARY	Robin Pzena	Edwin Cespedes
Suleman Lunat	Lizette St. Hilaire	Neal Desai, non-voting parent representative
	Kamilah Mitchell-Thomas	

### SUCCESS ACADEMY CHARTER SCHOOLS, INC. BOARD OF TRUSTEES

CHAIR	TRUSTEES	
Richard S. Pzena	Rosamund Else-Mitchell	C. C. Melvin Ike
VICE CHAIR/TREASURER	Mary G. Berner	Suzie Kovner
Richard Barrera	Diahann Billings-Burford	Yen Liow
SECRETARY	Katherine G. Farley	Daniel S. Loeb
Kent A. Yalowitz	Cindy H. Finkelman	Robert Niehaus
	Steven M. Galbraith	John Petry
	Joel Greenblatt	Simon Shaw
	S. Fitzgerald Haney	

### KEY DESIGN ELEMENTS

A focus on student achievement;	+	Charter school leaders with the power to lead;	+
Research-based, results driven curriculum;	+	Highly qualified and highly trained staff; and,	+
Frequent assessments produced and analyzed in real time;	+	Strong school culture including reinforcement of ACTION principles (Agency, Curiosity, Try and Try, Integrity, Others, and No Shortcuts).	+
Extended school day;	+		

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

**Renewal through July 31, 2027.** *The SUNY Charter Schools Institute (the “Institute”) recommends the SUNY Trustees’ Charter Schools Committee approve the following Applications for Charter Renewal:*

- *Success Academy Charter School - Bronx 1;*
- *Success Academy Charter School - Bronx 2; and,*
- *Success Academy Charter School - Harlem 5*

*through July 31, 2027, to align each related education corporation’s charter expiration and renewal schedule going forward. If renewed, each charter will be granted the authority to provide instruction to students in such configuration as set forth in each charter’s Application for Renewal. The Institute makes this recommendation as each charter 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”).<sup>2</sup>*

The table below presents information on the Institute’s plan<sup>3</sup> to align the charter expiration dates of the majority of charters under the education corporation. By the 2026-27 school year, the charter expiration dates for 33 of the 41 charter schools in SACS NYC will align. The remaining eight charters either opened in 2024-25 or are not yet opened, therefore the Institute will work with the education corporation to align expiration dates at the time of the remaining charters’ renewal years.

2024-25	2025-26	2026-27	
<b>Proposed True Up Renewal Through July 31, 2027</b>	<b>Proposed True Up Renewal Through July 31, 2027</b>	<b>Full Education Corporation Renewal</b>	
Success Bronx 1 Success Bronx 2 Success Harlem 5	Success Bed Stuy 1 Success Bushwick Success Far Rockaway Success Flatbush Success South Jamaica Success Upper West Side Success Bed Stuy 3 Success Harlem 1	Success Bed Stuy 2 Success Bensonhurst Success Bergen Beach Success Bronx 3 Success Bronx 4 Success Bronx 5 Lower Success Bronx 5 Upper Success Cobble Hill Success Crown Heights Success Sheepshead Bay Success Harlem 2 Success Harlem 3 Success Harlem 4	Success Hell’s Kitchen Success Prospect Heights Success Rosedale Success Springfield Gardens Success Washington Heights Success Union Square Success Williamsburg Success Norwood Success Hudson Yards

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

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

## EXECUTIVE SUMMARY

### EXECUTIVE SUMMARY

Success Bronx 1, Success Bronx 2, and Success Harlem 5 have each established a consistent track record of academic success consistent with trends across SACS NYC schools. The network supports schools through a multitude of strategies to engender strong student performance including continuously evaluating curricula, ensuring school principals maintain a singular focus on academic leadership, offering extensive professional development for all staff members, and implementing frequent assessment cycles to inform data driven planning and instruction.

In addition to offering robust school year programming, SACS NYC actively engages students during the summer through a variety of academic intervention and enrichment opportunities. For example, the education corporation provides an expanded summer school scope that not only targets students who have failed coursework, but also those who have not achieved mastery in discrete aspects of grade level content and newly enrolled students requiring additional academic support to meet grade level expectations. High school students can take part in the network's free summer program featuring dance and theater workshops, international trips, humanitarian work, journalism, and coding experiences, as well as residential pre-college programs outside of New York City. The education corporation also boasts a high college acceptance rate for its 2023-24 graduating class with many students receiving offers from selective institutions of higher education.

The information below demonstrates the key findings for the SUNY Trustees and highlights the successes of the schools.

### FINDINGS & INFORMATION

#### *Is each charter due for renewal an academic success?*

Success Bronx 1, Success Bronx 2, and Success Harlem 5 are each an academic success having met their Accountability Plan goals in mathematics and English language arts ("ELA").

Across the education corporation in 2023-24, 83% of SACS NYC students enrolled in at least their second year passed the ELA state exam and 97% passed the state mathematics exam. At the high school level, 100% of graduating seniors passed at least one Advanced Placement ("AP") examination.

- Success Bronx 1 posted notably high proficiency rates in mathematics over the term. From 2021-22 through 2023-24, the school's students in at least their second year scored at or above proficiency at rates that exceeded the absolute target of 75%. In 2023-24, 98% of students passed the mathematics exam surpassing the district rate by 62 percentage points.
- Success Bronx 2 exceeded the targets for all comparative and growth targets in every year of the term. The school posted effect sizes indicating performance higher than expected to a large degree compared to demographically similar schools.
- Success Harlem 5 produced similar results outperforming the district by at least 44 percentage points in ELA and at least 59 percentage points in mathematics each year.

## EXECUTIVE SUMMARY

### ***Is each charter due for renewal an effective, viable organization?***

SACS NYC is an effective, viable organization as are each of the three schools due for renewal. The network provides robust operational supports to each school and manages most back office supports. As a result, each school's director of operations is supported by a network of other operational leaders ensuring instructional leaders at the schools can focus on academics. Network operations leaders closely monitor metrics from an operational standpoint to ensure that schools optimize all systems across the education corporation. The board continues to provide thoughtful and effective oversight of both the contract with the network and of each school.

### ***Is each charter due for renewal fiscally sound<sup>4</sup>?***

SACS NYC is fiscally sound based on the Institute's analysis of the renewal application. The education corporation has a strong history of managing per pupil revenue in a way that meets the needs of its student population. The education corporation projects surpluses during the next charter term.

As of June 30, 2024, SACS NYC reported \$294.5 million in net assets and 1.2 months of cash on hand to cover immediate expenses. SACS NYC currently has the required amounts held in separate accounts in the event of dissolution as per the charter agreement. The education corporation had no material weaknesses or internal control issues in the 2023-24 annual financial audit.

### ***If the SUNY Trustees renew the education corporation's authority to operate each charter due for renewal, are its plans for the charters reasonable, feasible, and achievable?***

SACS NYC's plans for each charter due for renewal are reasonable, feasible, and achievable. SACS NYC plans to continue implementing its strong and effective academic programs that have led to student successes across the education corporation. Each school will continue operating in its current grade span with anticipated increased student enrollment. SACS NYC presents reasonable and achievable future budget projections over the next charter term for each school. Enrollment across the education corporation has been historically strong, and its future budgets project to maintain surpluses through the next charter term. Each school site will remain in its New York City Department of Education ("NYCDOE") co-located facility.

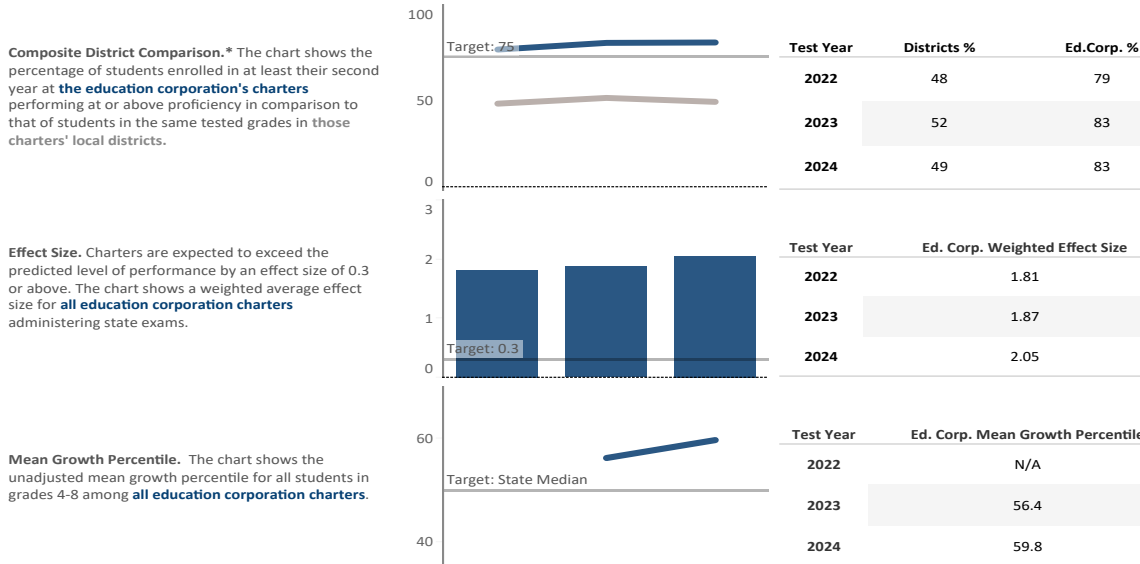
4. The U.S. Department of Education has established fiscal criteria for certain ratios or information with high – medium – low categories, represented in the table as blue – gray – orange. The categories generally correspond to levels of fiscal risk, but must be viewed in the context of each education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



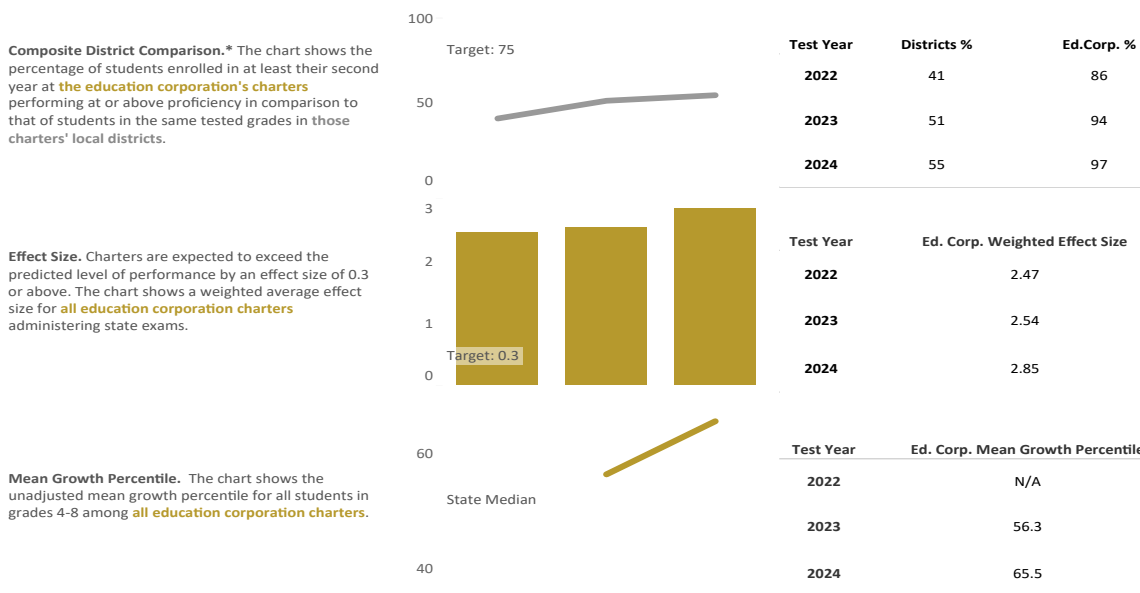
# EDUCATION CORPORATION OVERVIEW

## SUCCESS ACADEMY CHARTER SCHOOLS - NYC: AGGREGATE ELA AND MATHEMATICS PERFORMANCE FOR ALL CHARTERS

Success Academy Charter Schools - NYC  
**EDUCATION CORPORATION AGGREGATE ENGLISH LANGUAGE ARTS PERFORMANCE**



**EDUCATION CORPORATION AGGREGATE MATHEMATICS PERFORMANCE**

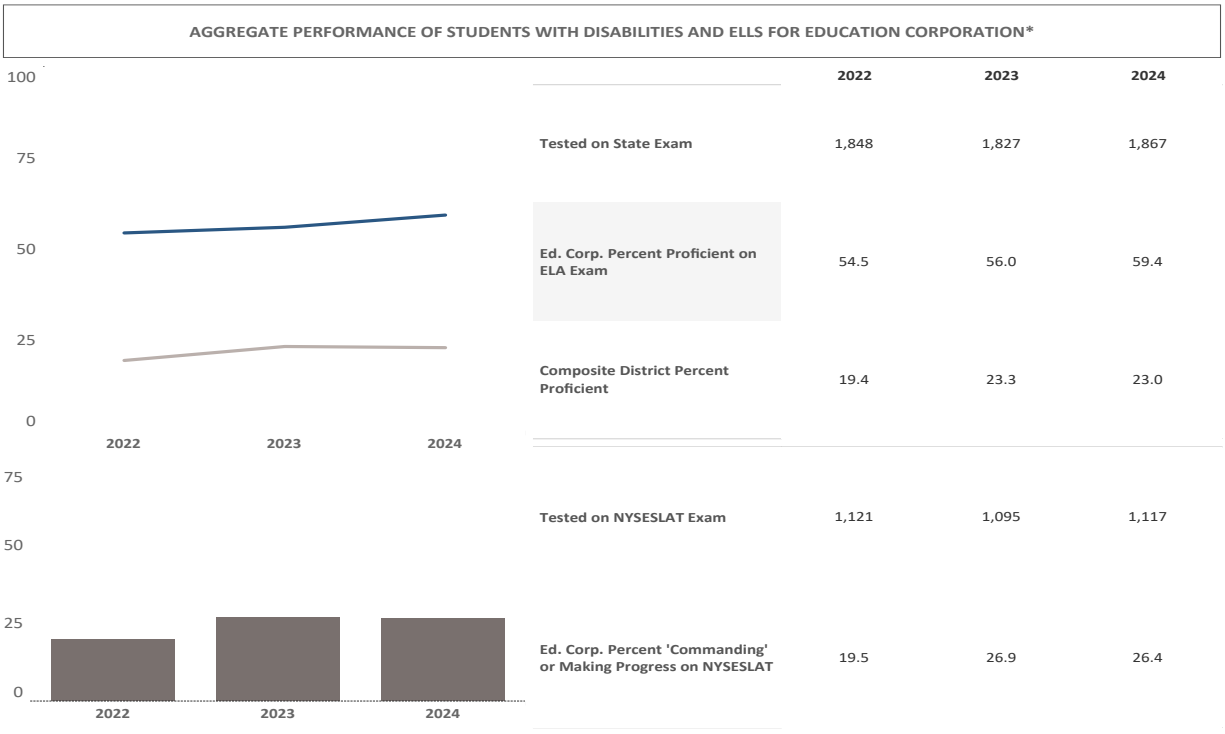
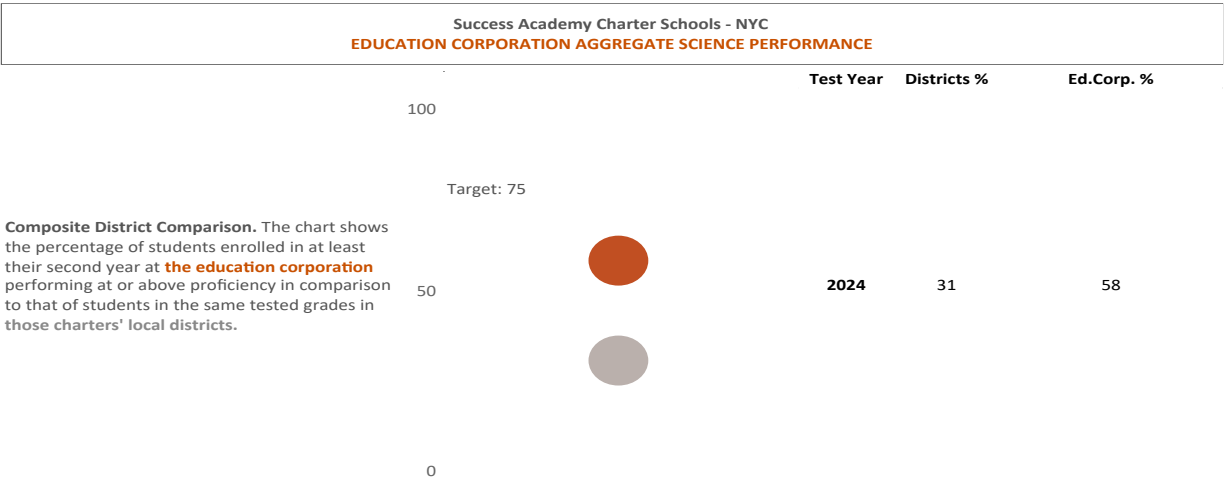


\* The composite district comparison is a weighted proficiency rate including all comparison grades from Districts/New York City Community School Districts ("CSDs") in which a charter in the education corporation is located. The data reflect results for all charters in the education corporation that have produced New York State exam results.



# EDUCATION CORPORATION OVERVIEW

## SUCCESS ACADEMY CHARTER SCHOOLS - NYC: AGGREGATE SCIENCE PERFORMANCE FOR ALL CHARTERS

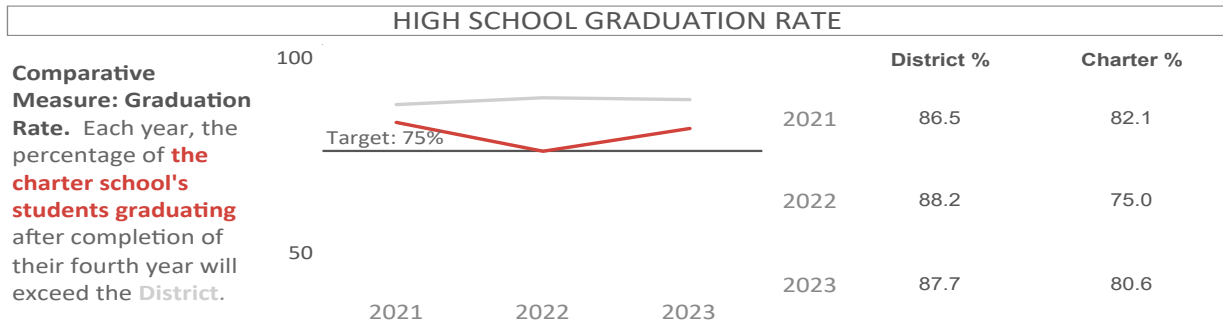


\*The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in a charter's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam. "Making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

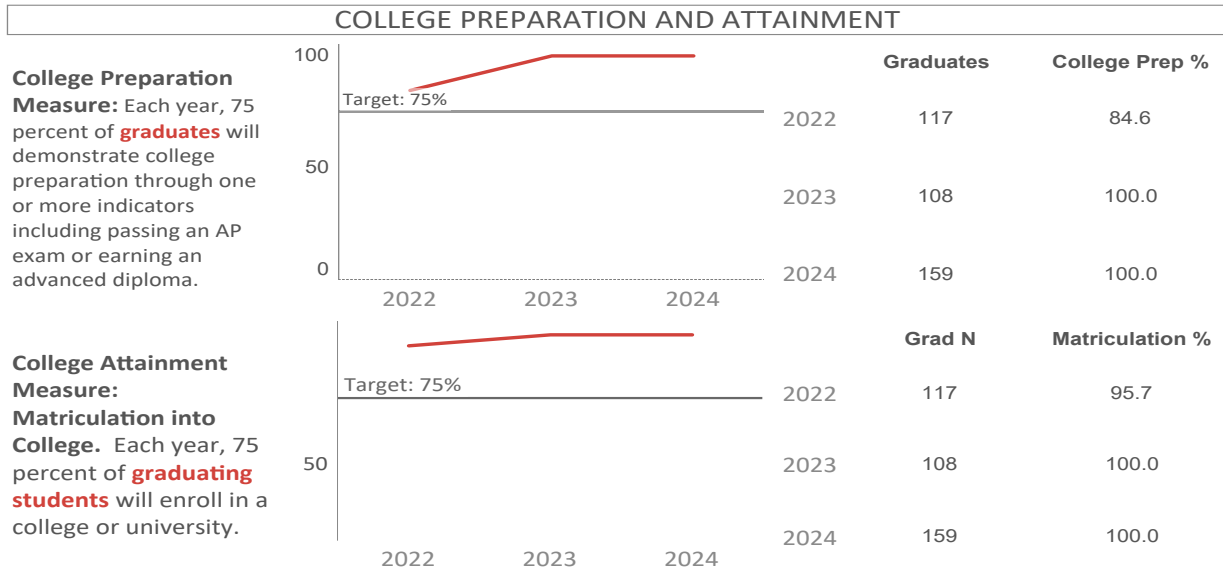


# EDUCATION CORPORATION OVERVIEW

## SUCCESS ACADEMY CHARTER SCHOOLS - NYC: AGGREGATE HIGH SCHOOL PERFORMANCE FOR ALL CHARTERS



**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**.



**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.

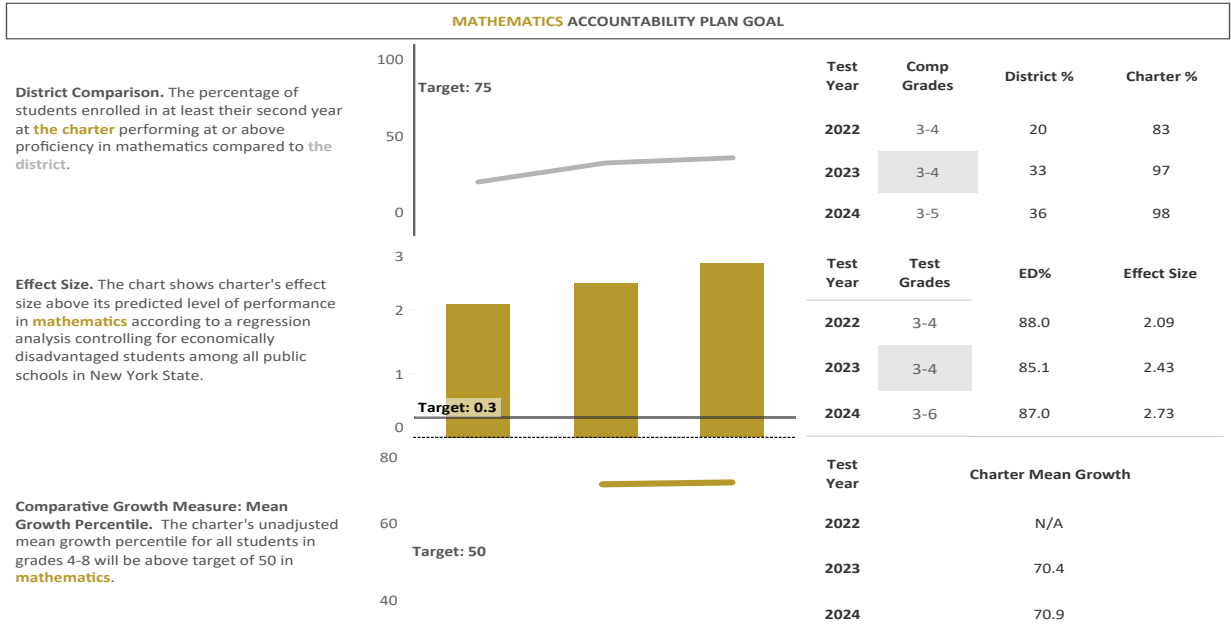
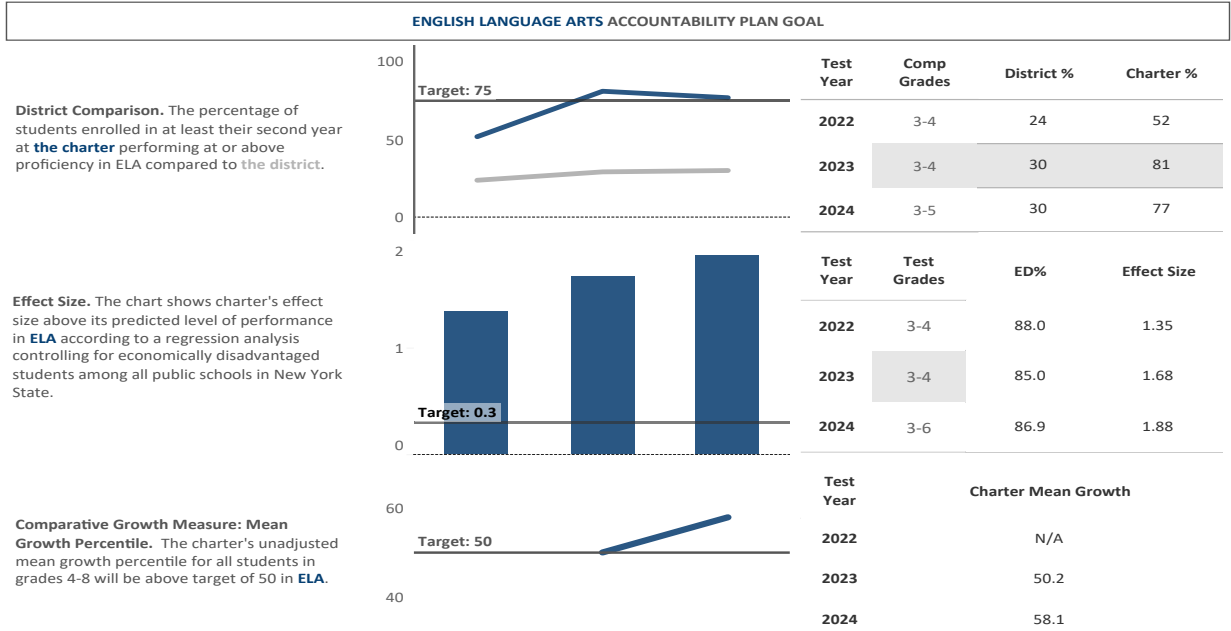
**College Attainment Measure: Matriculation into College.** Each year, 75 percent of **graduating students** will enroll in a college or university.

\* High school graduation data for 2023-24 is pending final validation by the Institute and education corporation.



# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 1

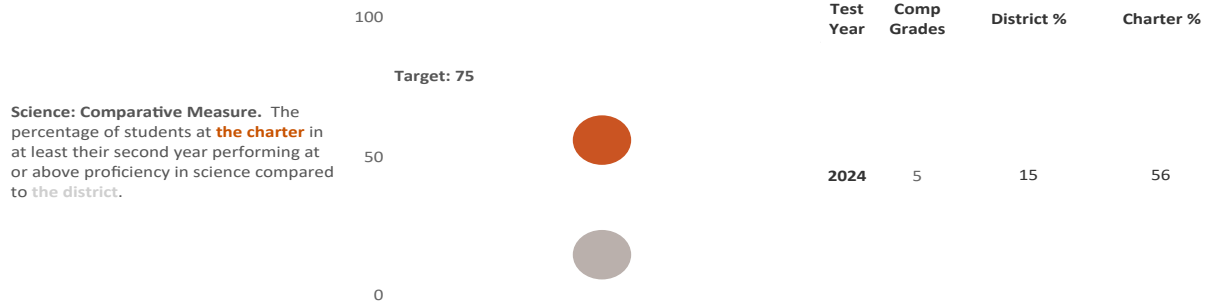




# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 1

### SCIENCE ACCOUNTABILITY PLAN GOAL



### TESTED PERCENTAGES

	2022		2023		2024	
	ELA	Math	ELA	Math	ELA	Math
School Tested Number	192	191	137	136	213	214
School Tested %	99.5%	99.0%	100.0%	99.3%	99.5%	100.0%
District Tested %	87.1%	89.0%	84.7%	87.8%	84.6%	87.1%

### SPECIAL POPULATIONS PERFORMANCE\*

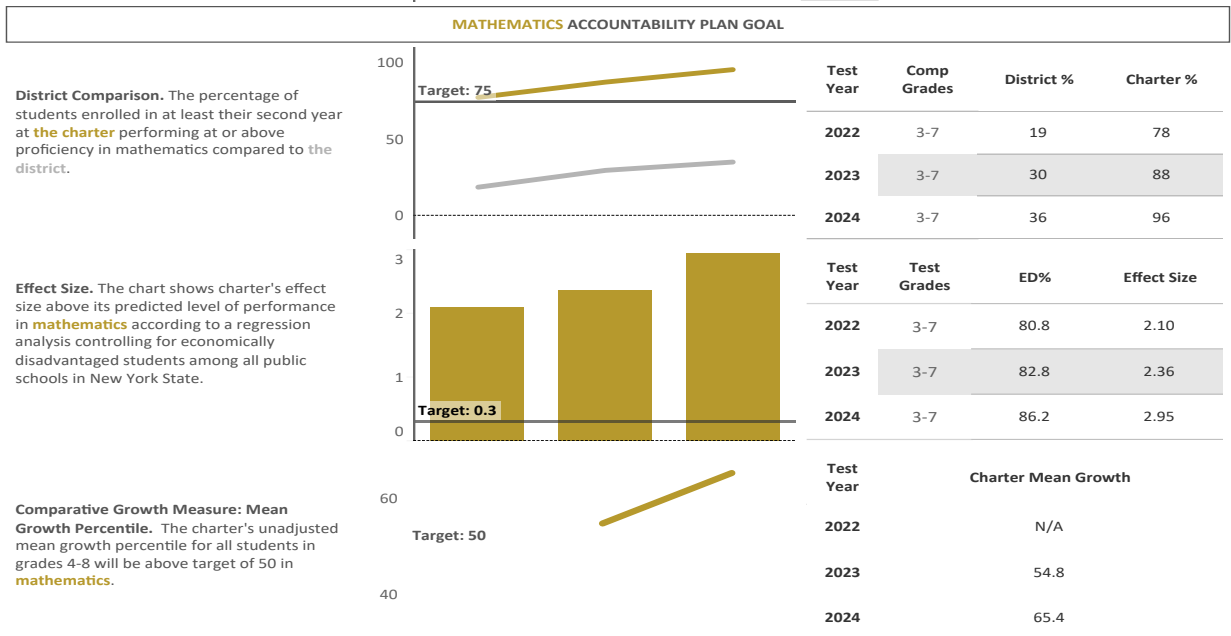
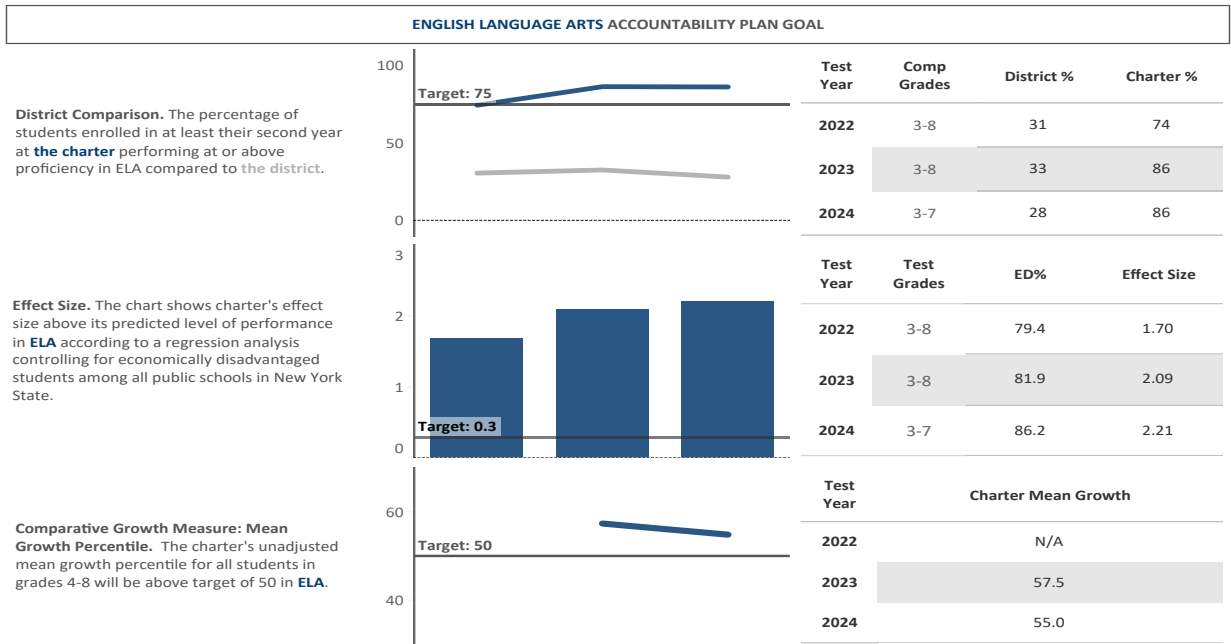
	2022	2023	2024
Students with Disabilities Tested on State Exam	31	19	42
Charter Percent Proficient on ELA Exam	35.5	47.4	57.1
District Percent Proficient	8.5	12.8	13.2
Tested on NYSESLAT Exam	38	27	29
Charter Percent 'Commanding' or Making Progress	13.2	29.6	27.6

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



# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 2





# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 2

### SCIENCE ACCOUNTABILITY PLAN GOAL



### TESTED PERCENTAGES

	2022		2023		2024	
	ELA	Math	ELA	Math	ELA	Math
School Tested Number	695	692	599	598	555	637
School Tested %	99.1%	99.1%	99.8%	99.7%	85.8%	98.5%
District Tested %	82.8%	84.6%	84.6%	87.7%	85.0%	88.2%

### SPECIAL POPULATIONS PERFORMANCE\*

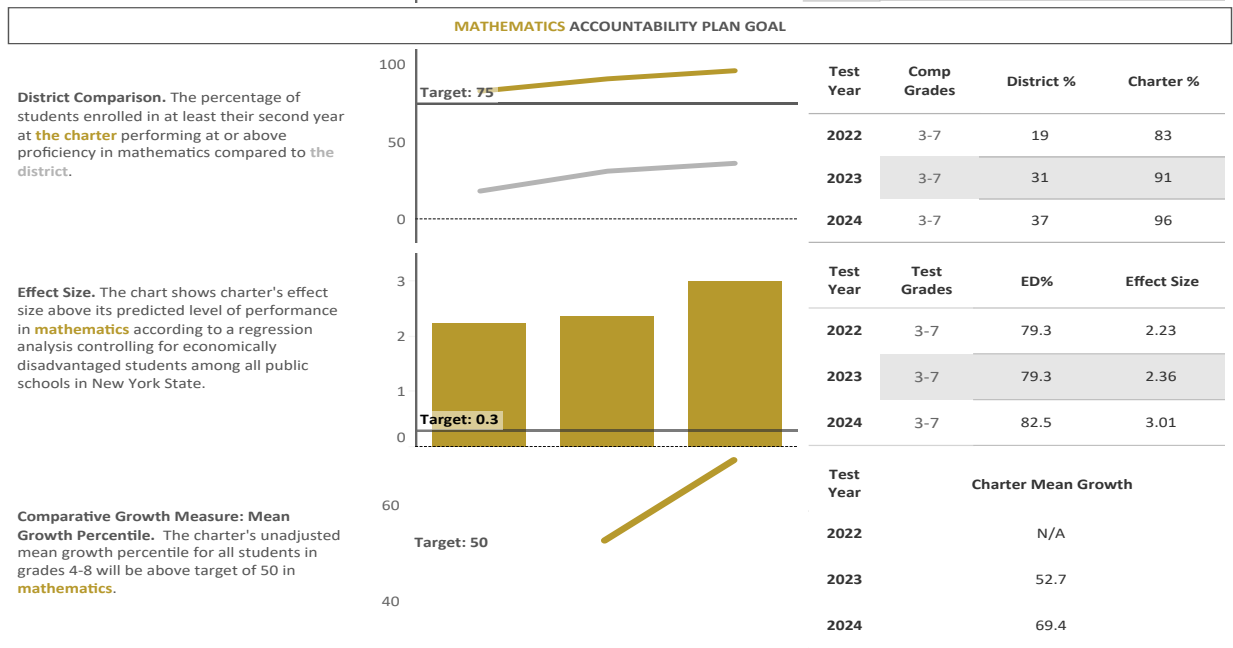
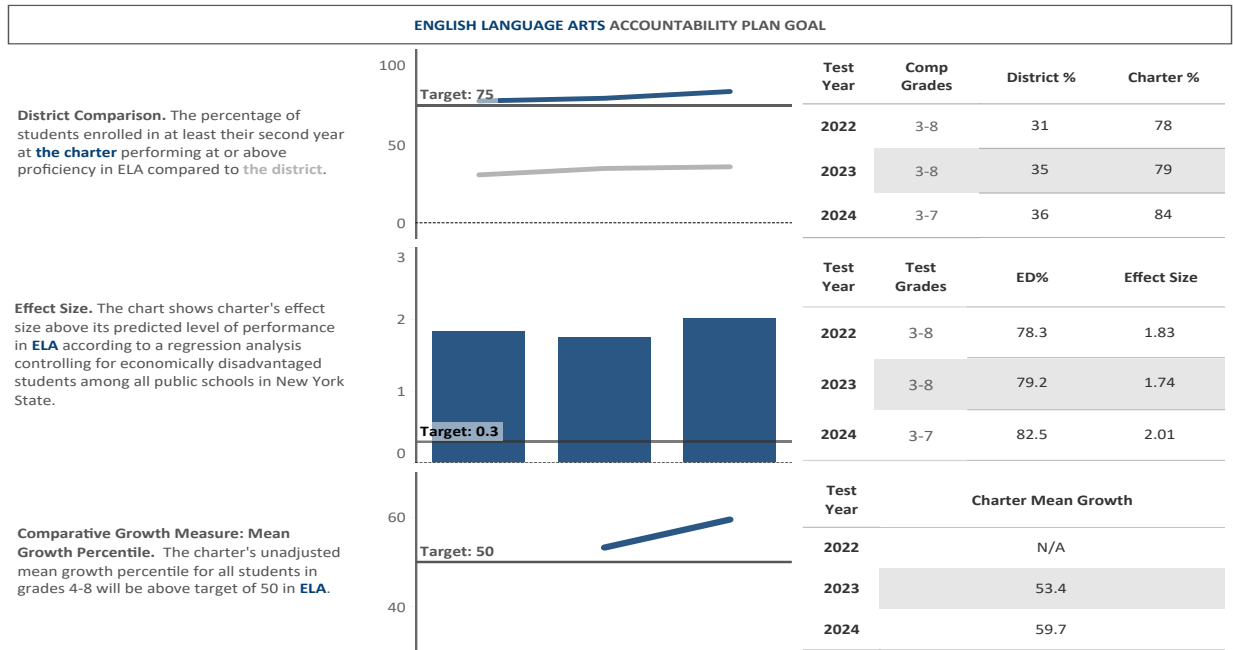
	2022	2023	2024
Students with Disabilities Tested on State Exam	120	104	113
Charter Percent Proficient on ELA Exam	45.0	68.3	71.7
District Percent Proficient	11.7	14.2	13.4
Tested on NYSESLAT Exam	93	64	55
Charter Percent 'Commanding' or Making Progress	21.5	32.8	29.1

\* 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".



# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 5

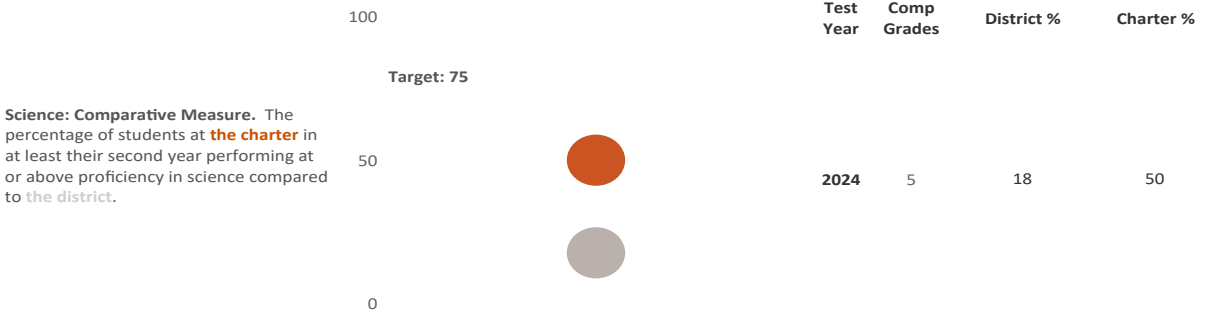




# ACADEMIC PERFORMANCE

## SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 5

### SCIENCE ACCOUNTABILITY PLAN GOAL



### TESTED PERCENTAGES

	2022		2023		2024	
	ELA	Math	ELA	Math	ELA	Math
School Tested Number	635	628	610	606	473	552
School Tested %	99.8%	99.2%	99.2%	98.7%	85.1%	99.3%
District Tested %	83.5%	82.9%	82.6%	82.2%	76.3%	80.7%

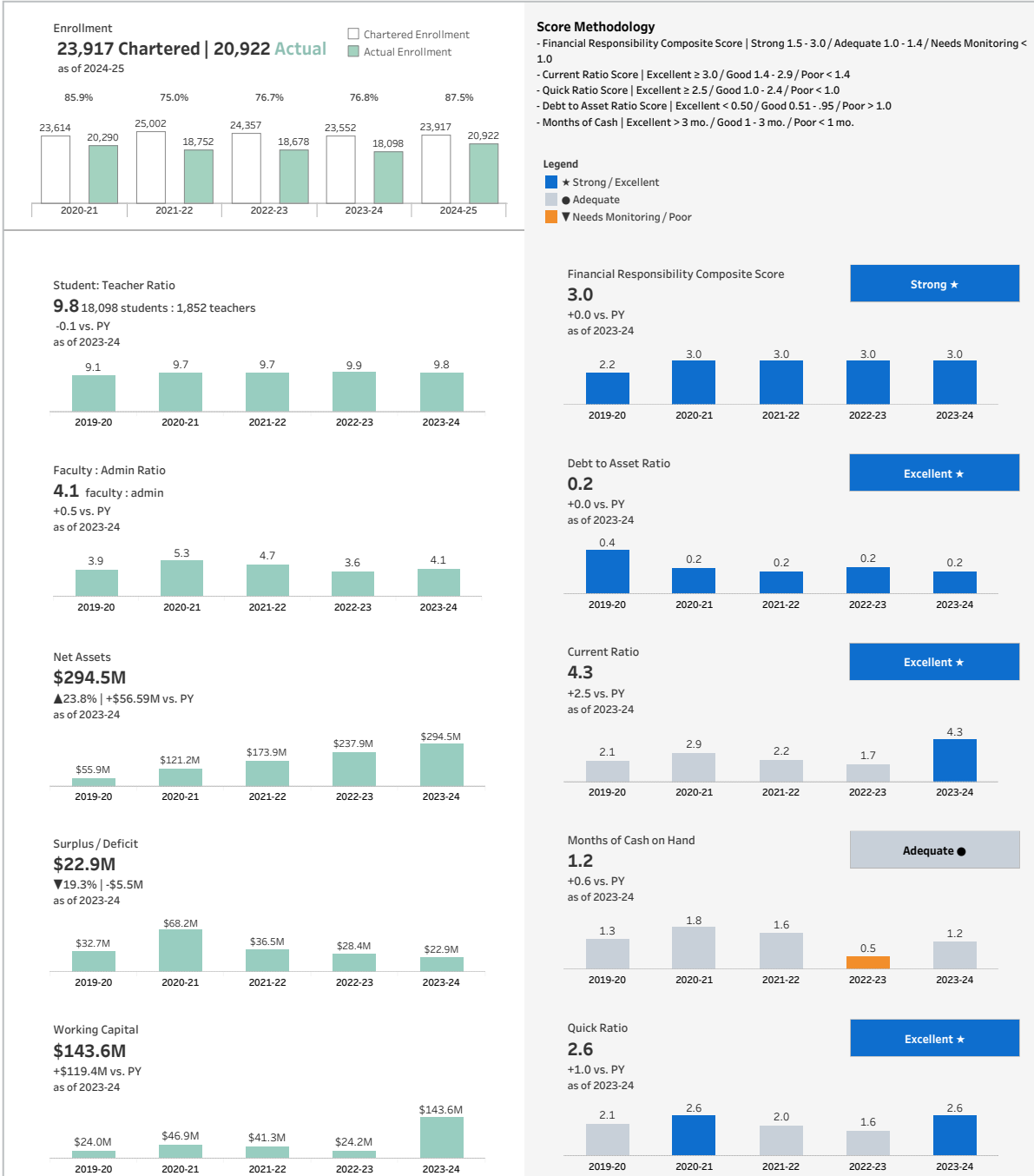
### SPECIAL POPULATIONS PERFORMANCE\*

	2022	2023	2024
Students with Disabilities Tested on State Exam	100	107	87
Charter Percent Proficient on ELA Exam	42.0	50.5	60.9
District Percent Proficient	13.3	18.0	18.1
Tested on NYSESLAT Exam	47	47	32
Charter Percent 'Commanding' or Making Progress	27.7	23.4	18.8

\* 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".

# FISCAL DASHBOARD

## SUCCESS ACADEMY CHARTER SCHOOLS - NYC



# FISCAL DASHBOARD

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 1



# FISCAL DASHBOARD

## SUCCESS ACADEMY CHARTER SCHOOL - BRONX 2



# FISCAL DASHBOARD

## SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 5



## COMPLIANCE REPORTING



### HAS EACH CHARTER DUE FOR RENEWAL SUBSTANTIALLY COMPLIED WITH APPLICABLE LAWS, RULES AND REGULATIONS, AND PROVISIONS OF ITS CHARTER?

*Each charter under renewal consideration substantially complies with applicable laws, rules and regulations, and provisions of the charter. During the current charter term, the education corporation and each charter due for renewal demonstrates a clear record of compliance with the terms of each charter including the timely submission of required reporting to the Institute.*

#### SUCCESS ACADEMY CHARTER SCHOOLS NYC

##### **Annual Reports**

The education corporation submitted its annual reports for the charters under renewal review to the Institute and the New York State Education Department (“NYSED”) on time but has not added all the required elements of the annual reports on its website as required under the Act. The Institute will work with the education corporation to ensure the accountability plan progress report and annual financial audit portions are posted prior to the start of the next charter term.

##### **FOIL**

The education corporation has a complete Freedom of Information Law (“FOIL”) policy but its subject matter list requires minor revision to include the annual date of review. The Institute will ensure compliance prior to the start of the next charter term.

##### **Open Meetings Law**

The education corporation does not post the materials and minutes for its board meetings as required under the Open Meetings Law. The Institute will ensure compliance prior to the start of the next charter term.

##### **Teacher Certification**

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 (STEM) or career and technical education courses.

The network partners with Touro University to offer the Transitional B Certificate in Elementary Special Education to cover tuition costs while the teacher remains employed by SACS NYC. In addition, the network conducts targeted outreach with early childhood and middle school certification programs, including New York University, Columbia University, University of Delaware, Vanderbilt University, Syracuse University, Boston College, and SUNY Binghamton University, while also targeting Teach for America alumni events, conferences, and similar programs.

## COMPLIANCE REPORTING

### SUCCESS ACADEMY CHARTER SCHOOL BRONX 1

**Teacher Certification**

At the time of the renewal review, the school employed 20 lead teachers. Of the 20 lead teachers, 12 were uncertified, which is within the allowable limit. Two of the 12 uncertified teachers met the appropriate qualifications under the Act.

### SUCCESS ACADEMY CHARTER SCHOOL BRONX 2

**Teacher Certification**

At the time of the renewal review, the school employed 34 lead teachers. Of the 34 lead teachers, 14 were uncertified, which is within the allowable limit. One of the 14 uncertified teachers met the appropriate qualifications under the Act.

### SUCCESS ACADEMY CHARTER SCHOOL HARLEM 5

**Teacher Certification**

At the time of the renewal review, the school employed 27 lead teachers. Of the 27 lead teachers, 15 were uncertified, which is within the allowable limit. One of the 15 uncertified teachers met the appropriate qualifications under the Act.



# COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

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

## PARENT SATISFACTION: SURVEY RESULTS

### **Parent Survey Data**

The Institute compiled data from SACS NYC’s annual family survey from the 2022-23 school year for each school due for renewal. The internal survey asks families about the quality of instruction and learning provided to their child, teacher preparedness, electives and scholar talent opportunities, safe and orderly environments, staff interactions, communication and timely access to school staff, and likelihood to refer the programs to a friend or neighbor.

In 2022-23, 38% of Success Bronx 1 families responded to the SACS NYC survey with an overall satisfaction rates of 89%.

In 2022-23, 49% of Success Bronx 2 families responded to the SACS NYC survey with an overall satisfaction rate of 86%.

In 2022-23, 48% of Success Harlem 5 families responded to the SACS NYC survey with an overall satisfaction rate of 87%.

### **Public Comments**

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

The NYCDOE held its required hearing for the Success Bronx 1, Success Bronx 2, and Success Harlem 5 renewal applications by videoconference on June 10, 2024. One teacher at a co-located school questioned whether the renewals would impact shared spaces. One district school parent opposed the renewal of Success Harlem 5, citing its enrollment and attrition rates as a lack of demand for the school and alleging that if the district schools had more students, they could improve the programs at those schools.

### **Enrollment and Retention**

The schools under renewal review make good faith efforts to meet their enrollment and retention targets. The network supports schools in their recruitment efforts and is well aware of which schools need to improve recruitment efforts for specific subgroups of students.

### **Persistence in Enrollment**

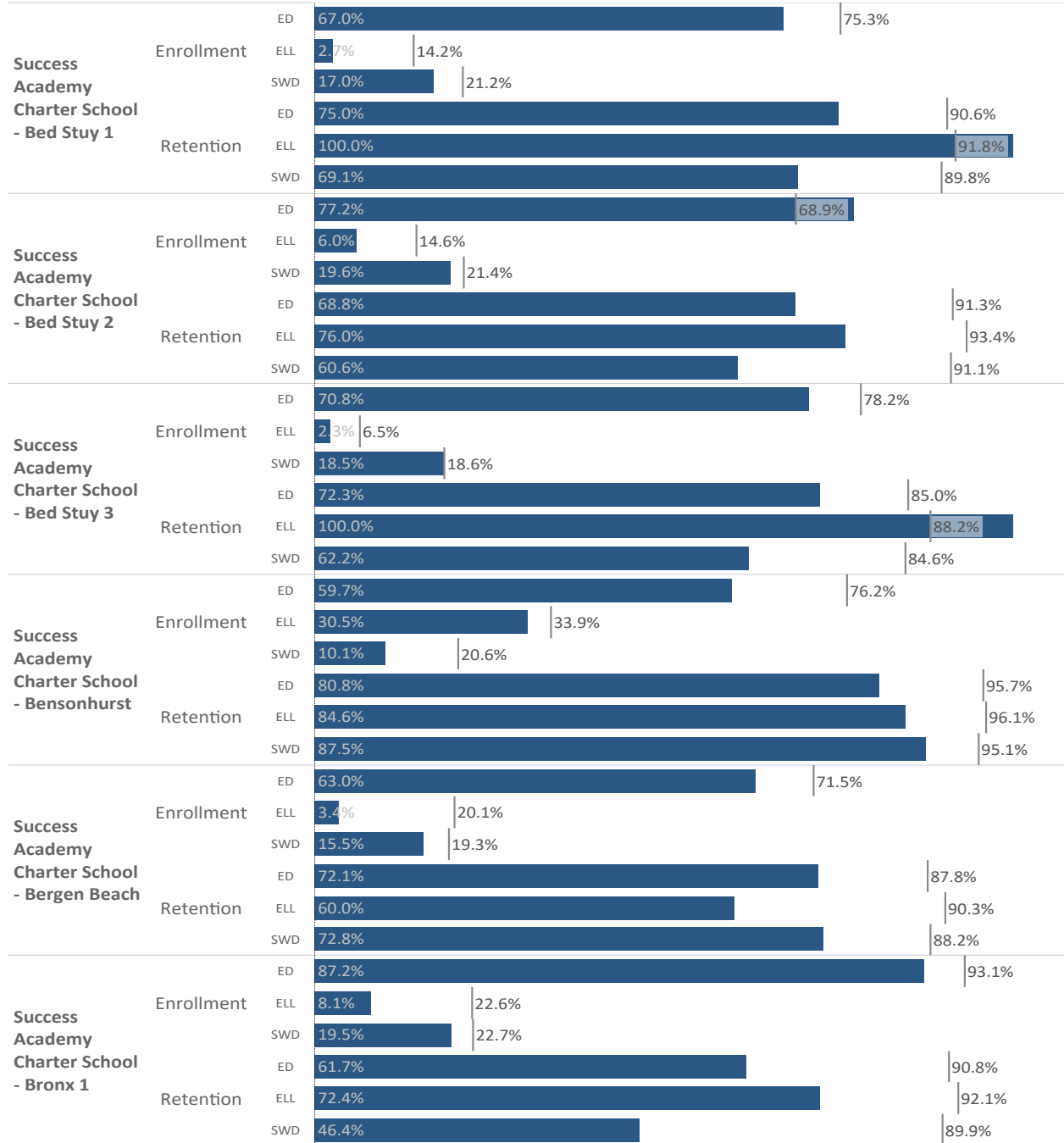
An additional indicator of parent satisfaction is persistence in enrollment. In 2023-24, 75% of SACS NYC’s students returned from the previous year. Student persistence data from previous years of the charter term are available in student demographics section of the report.

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



# COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

## ENROLLMENT AND RETENTION TARGETS

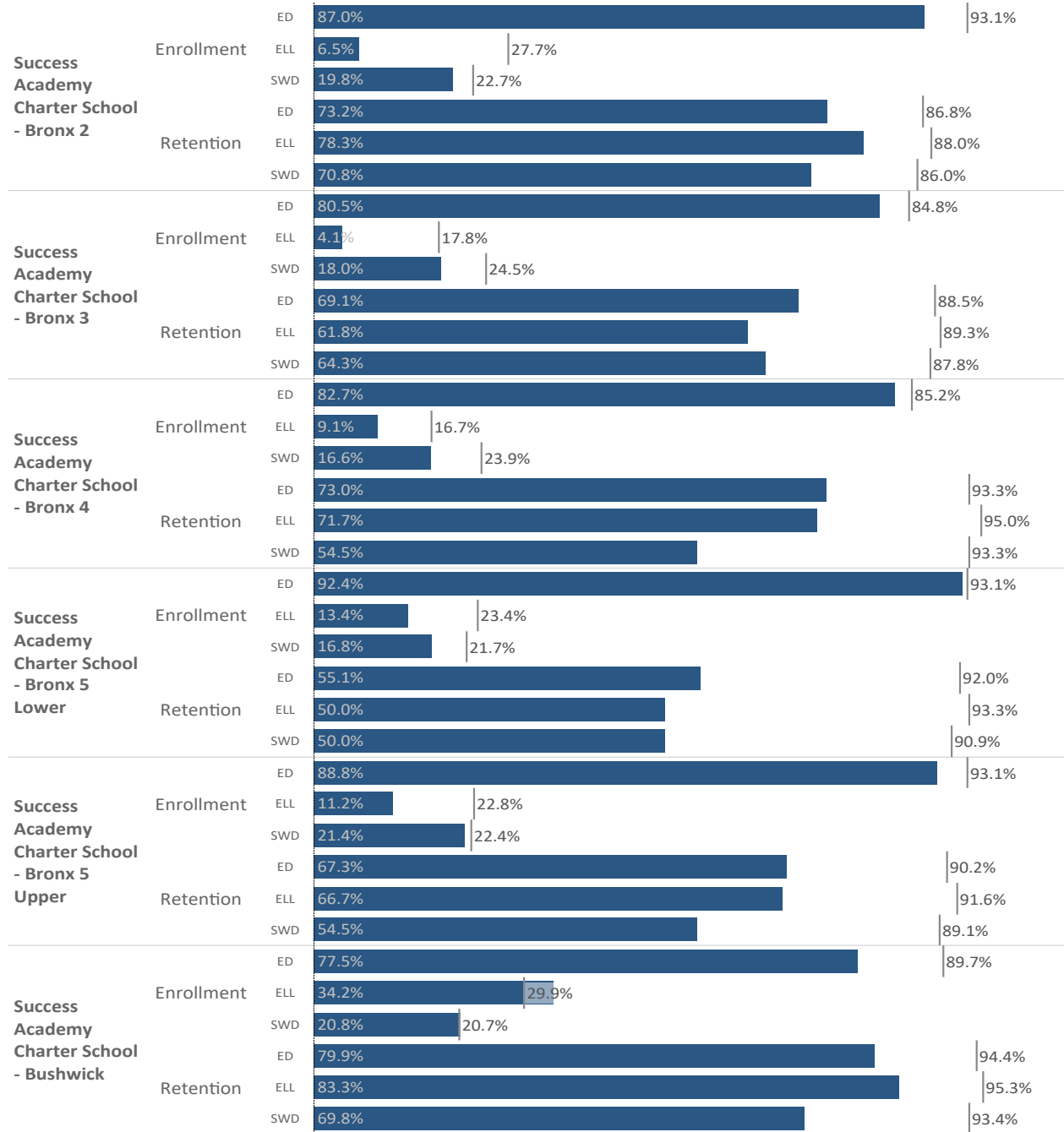


The chart illustrates the **current enrollment and retention percentages** against the **enrollment and retention targets** for each operating charter in the education corporation. As required by Education Law § 2851(4)(e), a charter must include in its renewal application information regarding the efforts it has, and will, put in place to meet or exceed SUNY's enrollment and retention targets for students with disabilities, ELLs, and FRPL students. This analysis is based on the most recent enrollment and retention data supplied to the Institute by the education corporation.



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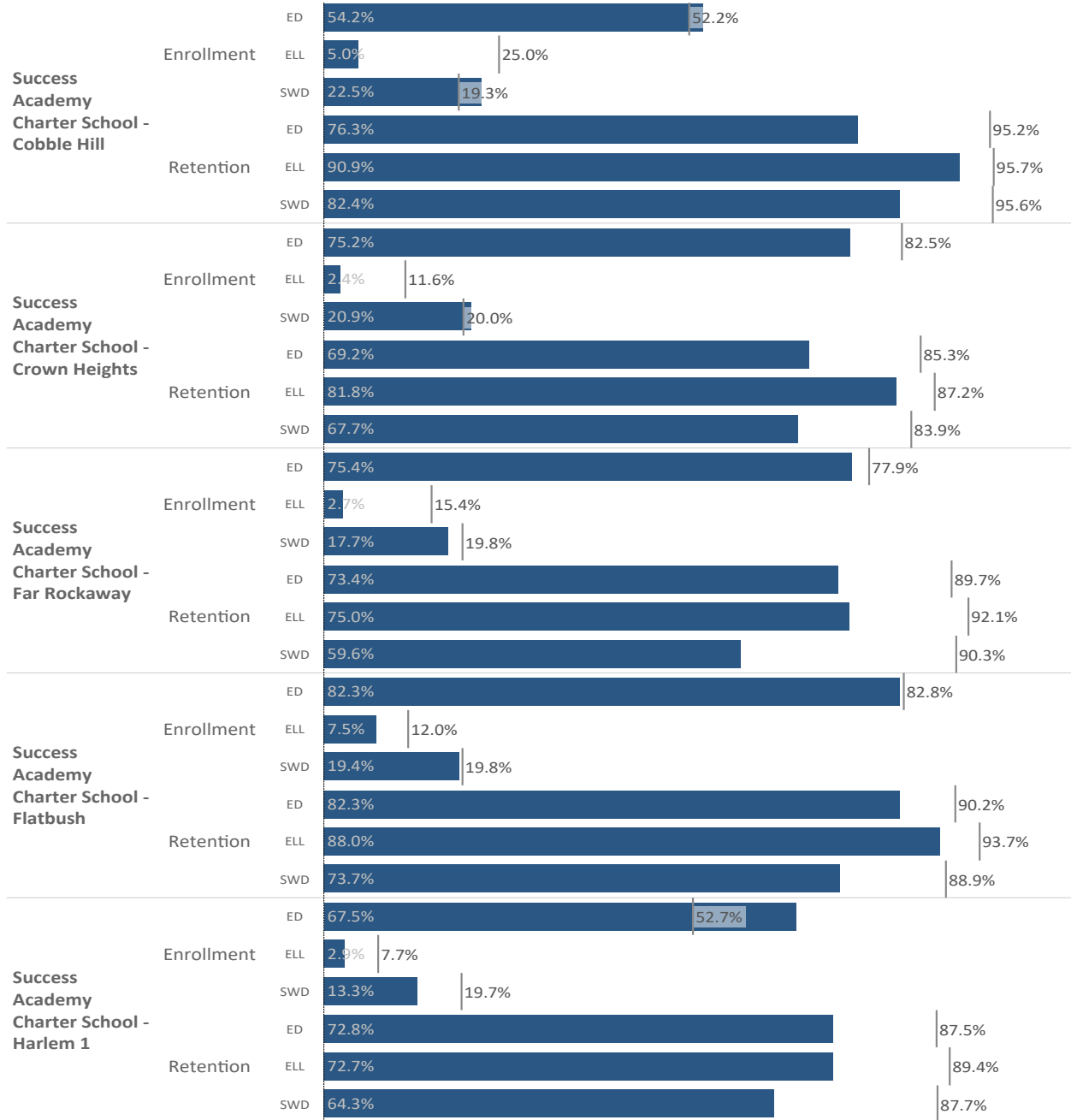


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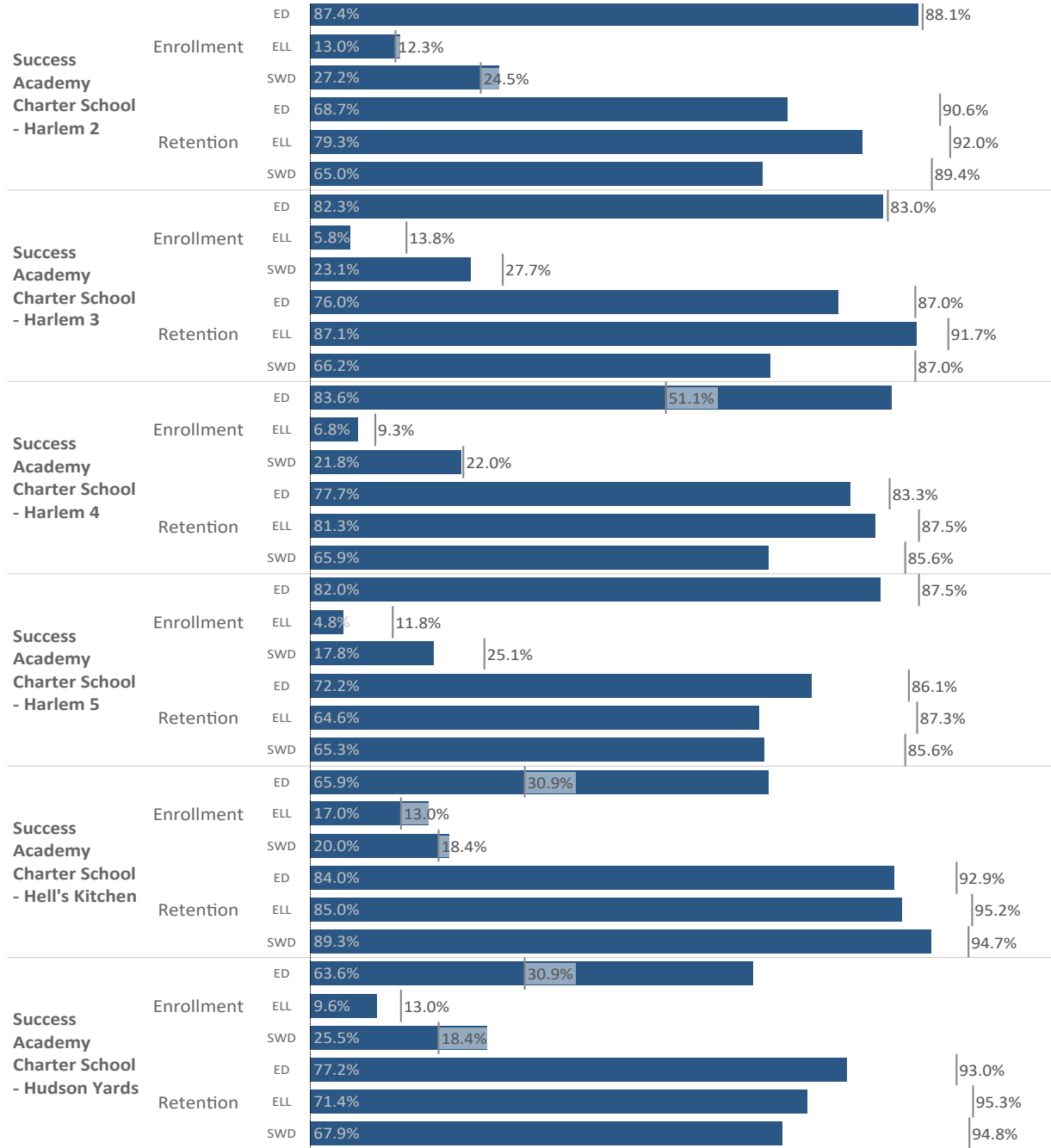


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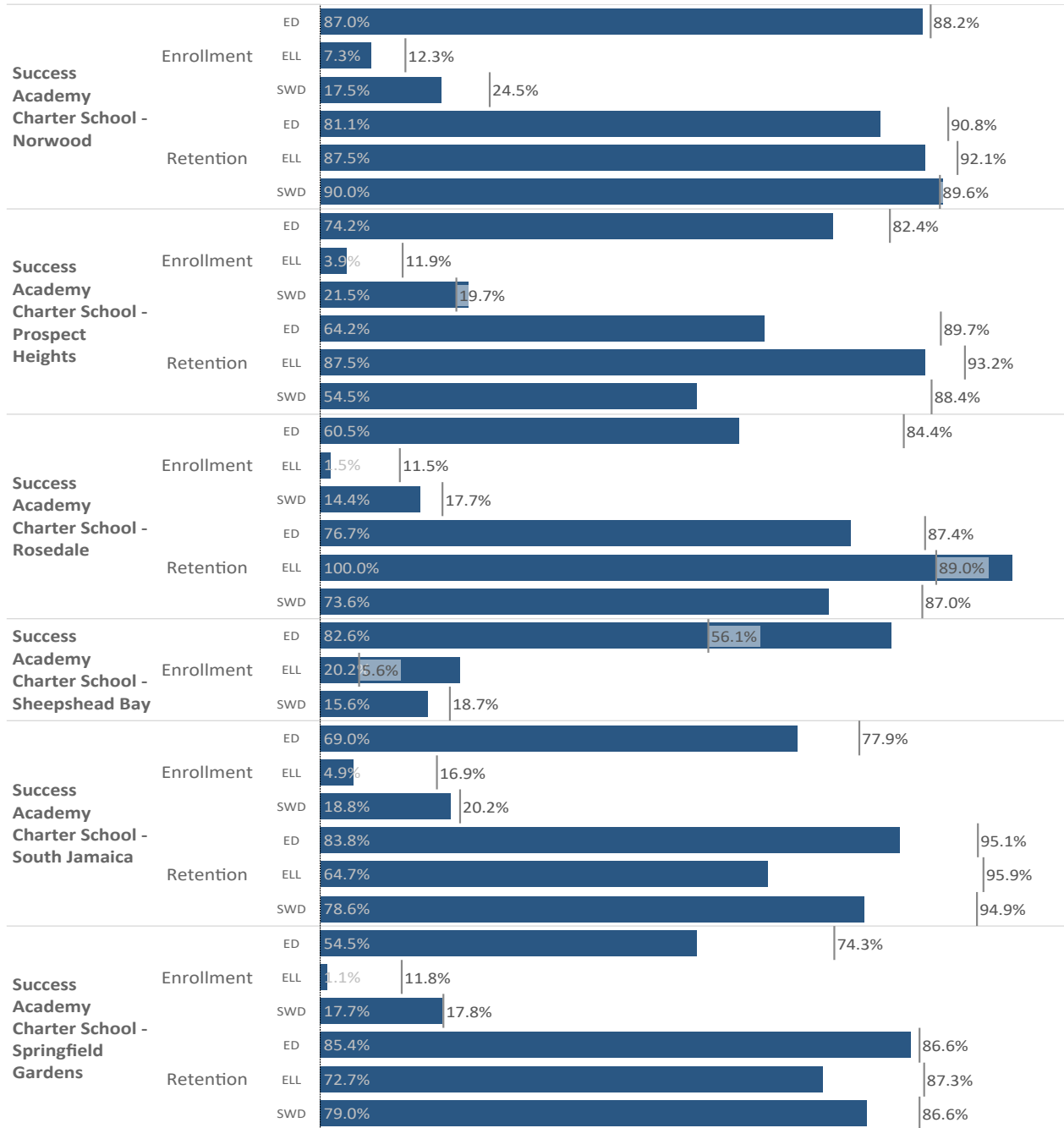


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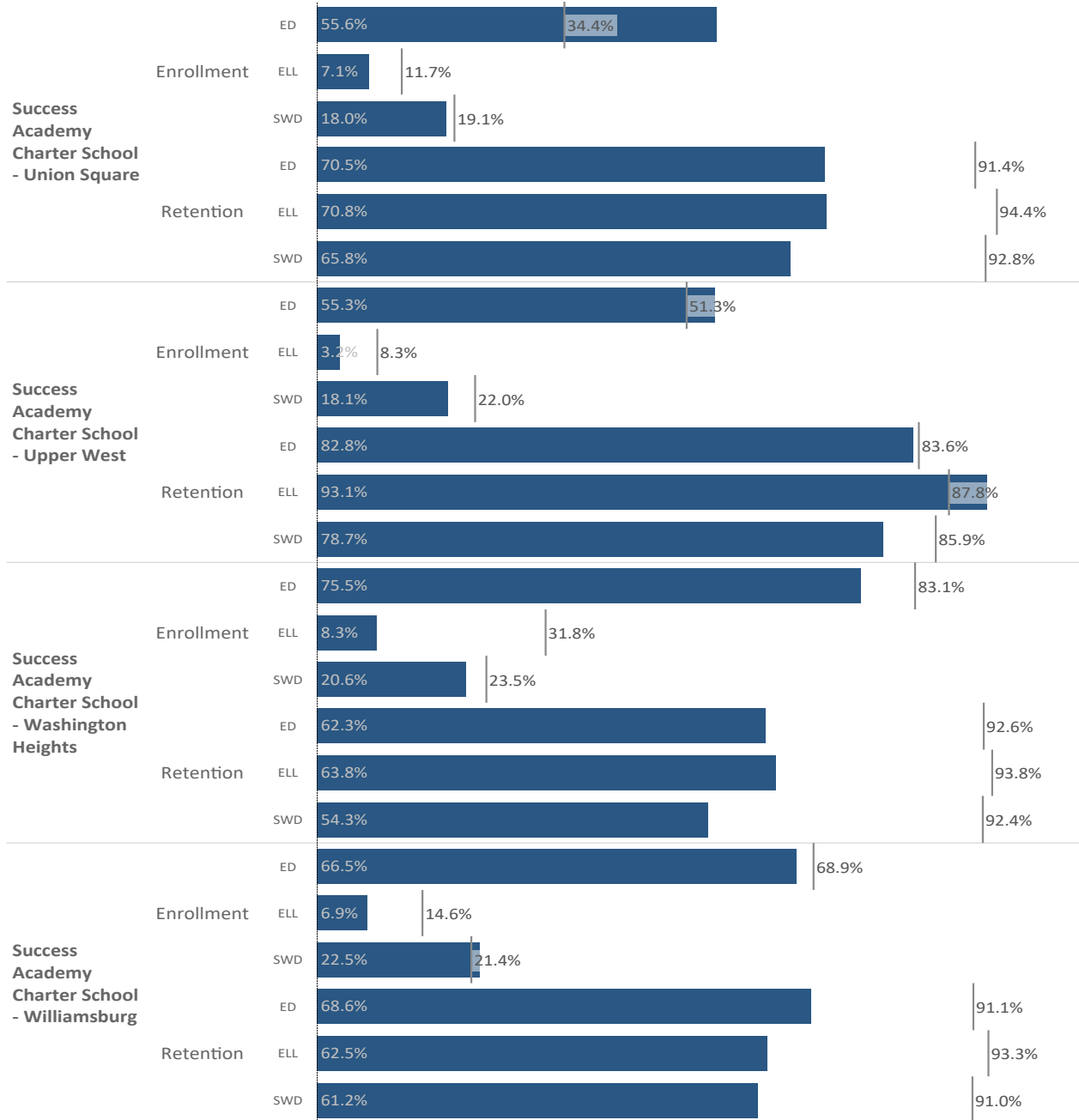


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Success Academy  
Charter Schools - NYC

# Ax

APPENDICES

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FISCAL  
BENCHMARKS

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**SUCCESS ACADEMY CHARTER SCHOOL – BRONX 1 – SCHOOL CHARACTERISTICS**

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2020-21	596	590	99%	K-4
2021-22	596	469	79%	K-4
2022-23	596	317	53%	K-4
2023-24	596	432	72%	K-6
2024-25	596	521	87%	K-7

**SUCCESS ACADEMY CHARTER SCHOOL – BRONX 2 – SCHOOL CHARACTERISTICS**

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2020-21	999	985	99%	K-8
2021-22	1,357	1028	76%	K-8
2022-23	1,273	882	69%	K-8
2023-24	1,064	934	88%	K-8
2024-25	1,054	922	87%	K-8

**SUCCESS ACADEMY CHARTER SCHOOL – HARLEM 5 – SCHOOL CHARACTERISTICS**

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2020-21	955	818	86%	K-8
2021-22	1,252	847	68%	K-8
2022-23	956	834	87%	K-8
2023-24	1,033	737	71%	K-8
2024-25	1,065	728	68%	K-8

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



**CHARTER VISIT HISTORY**

SCHOOL YEAR	SCHOOL AND VISIT TYPE	VISIT DATE
2008-09	Success Harlem 2 – First Year Visit	February 24, 2009
	Success Harlem 3 – First Year Visit	February 25, 2009
	Success Harlem 4 – First Year Visit	April 28, 2009
2009-10	Success Harlem 2 – Evaluation Visit	April 5 – 6, 2010
	Success Harlem 3 – Evaluation Visit	April 8 – 9, 2010
	Success Harlem 4 – Evaluation Visit	April 12 – 13, 2010
2010-11	Success Bronx 1 – First Year Visit	April 5, 2011
	Success Bronx 2 – First Year Visit	May 7, 2011
	Success Harlem 5 – First Year Visit	May 5, 2011
2011-12	Success BedStuy 1 – First Year Visit	May 8, 2012
	Success Upper West – First Year Visit	March 6, 2012
2012-13	Success Harlem 2 – Renewal Visit	November 27 – 28, 2012
	Success Harlem 3 – Renewal Visit	November 28 – 29, 2012
	Success Harlem 4 – Renewal Visit	November 28 – 29, 2012
2013-14	Success Crown Heights – First Year Visit	June 2 – 3, 2014
	Success Sheepshead Bay – First Year Visit	June 2, 2014
	Success Hell’s Kitchen – First Year Visit	June 5, 2014
	Success Prospect Heights – First Year Visit	June 3, 2014
	Success Union Square – First Year Visit	June 2, 2014
2014-15	Success Bronx 1 – Renewal Visit	December 11, 2014
	Success Bronx 2 – Renewal Visit	December 4, 2014
	Success Harlem 5 – Renewal Visit	December 2, 2014
2015-16	Success BedStuy 1 – Renewal Visit	September 10, 2015
	Success Bronx 3 – First Year Visit	April 13, 2015
	Success Harlem 1 – Renewal Visit	September 11, 2015
	Success Upper West – Renewal Visit	September 14, 2015
2016-17	Success BedStuy 2 – Renewal Visit	September 13, 2016
	Success Bensonhurst – Renewal Visit	April 13, 2017
	Success Bergen Beach – Renewal Visit	April 13, 2017
	Success Bronx 1 – Renewal Visit	September 15, 2016
	Success Bronx 2 – Renewal Visit	September 16, 2016
	Success Bronx 4 – Renewal Visit	April 11, 2017
	Success Clinton Hill – Renewal Visit	September 14, 2016
	Success Crown Heights – Renewal Visit	September 15, 2016
	Success Sheepshead Bay – Renewal Visit	September 14, 2016
	Success Harlem 5 – Renewal Visit	September 16, 2016
	Success Hell’s Kitchen – Renewal Visit	April 12, 2017
Success Prospect Heights – Renewal Visit	September 15, 2016	



**CHARTER VISIT HISTORY**

SCHOOL YEAR	SCHOOL AND VISIT TYPE	VISIT DATE
2016-17	Success Rosedale – Renewal Visit	April 14, 2017
	Success Springfield Gardens – Renewal Visit	April 14, 2017
	Success Union Square – Renewal Visit	September 19, 2016
	Success Washington Heights – Renewal Visit	April 10, 2017
	Success Williamsburg – Renewal Visit	September 13, 2016
2017-18	Success Hudson Yards – First Year Visit	May 29, 2018
	Success Norwood – First Year Visit	May 29, 2019
2018-19	Success BedStuy 1 – Renewal Visit	December 11, 2018
	Success Upper West – Renewal Visit	December 11, 2018
2019-20	Success BedStuy 2 – Renewal Visit	October 23, 2019
	Success Bushwick – Renewal Visit	October 23, 2019
	Success Cobble Hill – Renewal Visit	October 24, 2019
	Success Far Rockaway – Renewal Visit	October 25, 2019
	Success Flatbush – Renewal Visit	October 24, 2019
	Success South Jamaica – Renewal Visit	October 25, 2019
	Success Williamsburg – Renewal Visit	October 24, 2019
2020-21	Success BedStuy 3 – Renewal Visit (remote)	September 29 – October 2, 2020
	Success Harlem 1 – Renewal Visit (remote)	
2021-22	Success Hudson Yards – Renewal Review	September 15, 2021
2022-23	Success Crown Heights – Renewal Review	July 21, 2022 August 11, 2022 September 12 – 16, 2022 October 12 and 14, 2022
	Success Sheepshead Bay – Renewal Review	
	Success Harlem 2 – Renewal Review	
	Success Harlem 3 – Renewal Review	
	Success Harlem 4 – Renewal Review	
	Success Hell’s Kitchen – Renewal Review	
	Success Prospect Heights – Renewal Review	
Success Union Square – Renewal Review		
2023-24	Success Bensonhurst – Renewal Review	June 30, 2023
	Success Bergen Beach – Renewal Review	
	Success Bronx 4 – Renewal Review	
	Success Rosedale – Renewal Review	
	Success Springfield Gardens – Renewal Review	
2024-25	Success Washington Heights – Renewal Review	July 31, 2024
	Success Bronx 1 – Renewal Review	
	Success Bronx 2 – Renewal Review	
	Success Harlem 5 – Renewal Review	

**CONDUCT OF THE RENEWAL REVIEW**

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
July 31, 2024	Ciani Jones	Senior Analyst

## BENCHMARK SUMMARY

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

### ACADEMIC ACHIEVEMENT

Success Bronx 1, Success Bronx 2, and Success Harlem 5 met their key academic Accountability Plan goals over the charter term. The schools posted superlative achievement and exceeded the targets for all available measures under the English language arts ("ELA") and mathematics goals during 2023-24. That year, all three schools performed above 92% of all schools statewide in ELA and above 97% of all schools statewide in mathematics. Due to an error in data reporting, science results for 2021-22 are unavailable.

In ELA, the three schools under renewal review met their goal and posted high absolute proficiency rates over the charter term. In each year with data suitable for analysis, the schools' students enrolled in at least their second year posted ELA proficiency rates that exceeded the local district performance by at least 28 percentage points. In comparison to schools across the state enrolling similar percentages of economically disadvantaged students, the schools performed higher than expected to a large degree. In 2022-23 and 2023-24, each school posted a growth score that exceeded the target of 50.

From 2021-22 through 2023-24, the three schools under renewal review met their mathematics goal. The schools' students enrolled in at least their second year outperformed the local district by at least 58 percentage points each year. All three schools posted high effect sizes that far exceeded the target of 0.3 indicating performance higher than expected compared to demographically similar schools. The schools exceeded the growth target over the term. Notably, Success Bronx 1 posted a growth score above 70 for two consecutive years.

### ASSESSMENT

SACS NYC schools administer a variety of diagnostic, formative, and benchmark assessments throughout the school year to track student progress and identify learning needs. The education corporation's comprehensive approach to operationalizing assessment data maximizes the effectiveness of teacher coaching and classroom instruction.

In ELA, the schools administer the Fountas & Pinnell Benchmark Assessment System ("F&P") and Success for All ("SFA") assessments along with frequent vocabulary and spelling tests to track student progress in literacy and pinpoint areas for academic intervention. The schools also administer network-developed weekly, monthly, and quarterly interim assessments in mathematics, science, and ELA. The network's process for creating internal assessments is extensive and includes opportunities to field new test items in order to assess validity and reliability before incorporating formally into summative assessments along with teacher training to ensure

the reliable scoring of responses. For example, following the administration of interim assessments, grade level teachers exchange student work and set a performance standard across classrooms to ensure grading consistency.

School-based data coordinators and network leaders use a student information system (“SIS”) to examine assessment data at the student, class, grade, and school levels and to generate bespoke reports to inform the support provided to teachers and students. Reports include campus-to-campus performance comparisons that enable leaders to identify exemplar classrooms and areas of need to facilitate peer observations of instruction across schools. Leaders also use data to develop targeted coaching plans for teachers and evaluate teacher and program effectiveness. School leaders and the network’s instructional management team use data to identify topics for professional development and to identify strategies needed for general coaching.

## CURRICULUM

SACS NYC’s rigorous, research based curriculum supports teachers with instructional planning. The network conducts ongoing reviews of its curricular materials to ensure that its schools prepare students for success on state assessments and in respective college and career pathways. Beyond considering performance of students at its charters and across New York State, SACS NYC reviews the practices of high performing schools nationwide alongside developments in educational research while assessing its curricular strengths and weaknesses. During the school year, teachers work in grade level study teams to adjust instructional plans and provide feedback to instructional leaders who pass the information to network teams. School leaders complete annual surveys of the curriculum’s effectiveness.

Network content area teams manage revision of curricular materials by reviewing feedback from schools and piloting instructional materials in classrooms. In addition to a curricular framework that details what students will learn in each grade, teachers use a variety of supporting tools including scope and sequence documents, unit plans, and individual lesson plans that provide a bridge between the framework and daily lessons. These materials detail what students should learn and be able to do throughout the school year, so teachers know what to teach and when to teach it. Importantly, the framework creates a multitude of opportunities for interdisciplinary instruction with thematic units, which cover common themes in different content area lessons.

The academic program relies on a combination of network-developed and commercial curricula. For ELA, SACS NYC charters supplement its internally developed THINK Literacy framework with the SFA program, which uses a research based approach to enhance students’ literacy skills through methods such as cooperative learning and frequent assessment of student understanding. In mathematics, the schools use TERC Investigations, a program that centers on teaching fundamental ideas of numbers, operations, data, and measurement, along with Cognitively Guided Instruction, an instructional approach that builds students’ mathematical problem solving ability in the elementary grades. In the middle school grades, schools use a network-developed program adapted from Mathematics in Context, a module based program that challenges students to solve real world problems largely through peer discussion. Students develop higher order thinking and problem solving skills as they apply mathematical thinking to answer questions rich with engaging, realistic context.

In addition to internally developed science and technology programs, SACS NYC schools offer an array of specials classes including chess, theater, dance, and sports.

## PEDAGOGY

High quality instruction that creates a consistent focus on academic achievement and develops students' higher order thinking and problem-solving skills is evident across SACS NYC classrooms. Across first year visits, midcharter term visits, and renewal visits to SACS NYC charters, Institute evaluation teams consistently found well crafted lessons that feature student-to-student interaction in solving real world problems, skillful questioning, and ongoing informal assessment of students' progress toward concept mastery. In alignment with SACS NYC's priorities of building more student independence, the Institute observed teachers providing more independent work times for students as well as more time to grapple and unpack difficult concepts. Teachers also integrate technology within lessons where scholars complete work tasks on laptops, which then allows teachers to see in the moment work and provide immediate feedback to individual students.

Typically, lessons limit the amount of time spent on direct instruction while maximizing opportunities for students to work independently or in small groups. In a mathematics lesson, for example, the teacher typically sets out a sample problem and asks students to solve it. The teacher may then ask students to explain to each other how they solved it and assess the need for additional examples by asking individual students direct questions and checking for whole class understanding with a thumbs up/thumbs down prompt. Once the teacher determines students are ready to move on, students then participate in a challenging activity that builds on students' previous knowledge and features the recently introduced concept. In addition to circulating around the classroom to monitor students' progress as they work collaboratively, the teacher might have students independently complete a brief task at the end of the planned lesson in order to adjust future instruction based on student responses. Across content areas, SACS NYC teachers' questions challenge students to deepen their understanding of concepts and engage in rich peer-to-peer discussions. With students responsible for most of the talking during a lesson, teachers encourage students to be active learners capable of handling the heavy cognitive lifting required to develop higher-order thinking skills.

A pervasive sense of urgency for learning is part of the SACS NYC approach to instruction. Teachers maximize learning time with appropriate lesson pacing and effective classroom management techniques. Routines for transitioning students from one lesson to the next or one topic to the next within a lesson ensure students remain focused on learning tasks. Silent hand signals generally enable teachers to redirect any low level misbehavior without disrupting the learning environment.

## INSTRUCTIONAL LEADERSHIP

SACS NYC schools implement strong instructional leadership practices that include providing teachers with extensive coaching and professional development opportunities designed to catalyze accelerated student learning and achievement. Robust instructional teams at the school and network levels support the development of instructional leaders and teachers with daily sustained and systemic coaching and professional development activities that interrelate with classroom practice. Teachers receive an average of over 400 hours of professional development throughout the year including intervisitation opportunities for teachers and leaders to observe strong teaching across network schools and data analysis days where staff members analyze benchmark assessments. Schools throughout the education corporation set high expectations for teacher performance measured largely by student achievement results. All charters use the SIS to monitor progress toward meeting network-wide performance goals as well as schoolwide goals set by the leader.

SACS NYC’s particularly strong professional development program begins with summer “Teacher School,” a three week pre-service training often referred to as “T-School.” School leaders and network staff members collaborate to determine topics for trainings designed to address student achievement and teacher pedagogical needs based on observation and student data. In addition to network-wide activities, school leaders conduct weekly professional development sessions that build on topics and skills introduced in T-School, frequently differentiated by content area or grade level, in order to target teacher and student needs most precisely. In addition to gearing professional development activities toward specific grades, leaders often conduct different sessions for varying levels of experience.

### AT RISK

SACS NYC schools have a wide range of effective supports in place to meet the needs of at-risk students. Teachers and leaders implement clear procedures for identifying and serving students with disabilities, ELLs, and students at risk of academic failure. Schools disaggregate student performance data on an ongoing basis to assess the effectiveness of instructional and behavioral interventions. Teachers across the network receive extensive professional development designed to prepare them to meet the needs of all students.

SACS NYC schools use a tiered Response to Intervention (“RTI”) process to identify students struggling academically and to modify interventions as necessary. The SFA curricular program embeds initial interventions within each school’s curricula in that the program emphasizes early oral language development through rich peer-to-peer discussions. Teachers combine whole class instruction with flexible, ability-based groupings to respond to individual needs. Teachers provide students identified as performing below grade level progressive supports within the classroom setting and through pull out tutoring. Leaders and teachers identify specific learning gaps and monitor students’ progress in meeting performance goals at the end of each intervention cycle, usually aligning with network benchmark assessments. If a student does not make sufficient progress, school-based student support teams determine next steps including additional small group or individualized interventions and referral to the district Committee on Special Education (“CSE”) as necessary. As charter schools are considered part of the district under federal law for the purposes of providing settings and services to students with disabilities, the CSE holds statutory responsibility for evaluating special service needs and making Individualized Education Program (“IEP”) determinations. Charter schools must then implement the IEPs approved by the CSE.

SACS NYC schools educate students with disabilities in the least restrictive environment in accordance with each student’s IEP while offering additional supports embedded in its existing programming. The schools offer students with disabilities related services (e.g., speech/language, occupational, physical, and psychological therapy), integrated co-teaching (“ICT”) classrooms, individual and group counseling, behavior intervention plans, and additional supports within the RTI framework. Some sites also offer 12:1+1 settings for students with more specific special needs. Teachers are well aware of students’ IEP goals and collaborate with at-risk program staff members to plan instruction and monitor progress. Student support teams meet regularly to discuss students’ progress toward meeting IEP goals using disaggregated data from the network SIS, classroom assignments, and teacher observations.

SACS NYC schools use the Home Language Identification Survey and the New York State Identification Test for English Language Learners (“NYSITELL”) to identify students requiring English acquisition supports. SACS NYC implements a comprehensive English language immersion program focused on increasing early literacy skills.

The schools serve ELLs within the core academic program, which provides abundant opportunities for oral and written communication through its curriculum. Schools monitor student progress annually with the New York State English as a Second Language Achievement Test (“NYSESLAT”) and informally throughout the school year.

Network professional development activities develop teachers’ skills in supporting ELLs with strategies such as intentional seating, visual demonstrations, and the use of supplementary audio materials. These supports prove to be successful with many ELLs reaching English proficiency and performing better than district peers on state ELA assessments.

### ORGANIZATIONAL CAPACITY

SACS NYC establishes well functioning organizational structures with staff members, systems, and procedures that support high levels of student achievement and effective delivery of the comprehensive educational program. Clear roles and responsibilities at both the school and network level allow instructional leaders to focus on student learning, pedagogical practice, and teacher development. Strong network supports and clearly established career paths assist SACS NYC in recruiting and retaining high quality teachers. SACS NYC invests in developing teaching teams through certification support. Historically, the charters have entered into partnerships with Touro University and Hunter College whereby SACS NYC teachers earn a master’s degree from a graduate school of education at no cost while teaching full time.

The network centrally manages student recruitment and efforts to meet enrollment and retention targets for students with disabilities, ELLs, and economically disadvantaged students. For more information on enrollment and retention targets across the education corporation, see the Community Satisfaction and Enrollment and Retention sections in the body of the report. Efforts to recruit at-risk students include multilingual advertisements, informational sessions, and canvassing of local neighborhoods. SACS NYC implements an ELL lottery preference to bolster its efforts to meet enrollment targets for ELLs.

SACS NYC continually monitors its programs and makes changes as necessary. The network instructional team regularly uses the SIS to analyze student assessment data in order to identify which objectives students have mastered and which they have not. This determination may result in adjustments to pacing documents and other curricular materials. School leaders have some discretion over the implementation of certain program aspects. However, network analyses of data gathered from assessments, leaders’ daily observations of classrooms, feedback from leaders provided in annual surveys, and informal communications through the year mainly drive major changes. The network curricular team has made changes to existing curricular materials and modifications to professional development plans based on these analyses.

### BOARD OVERSIGHT & GOVERNANCE

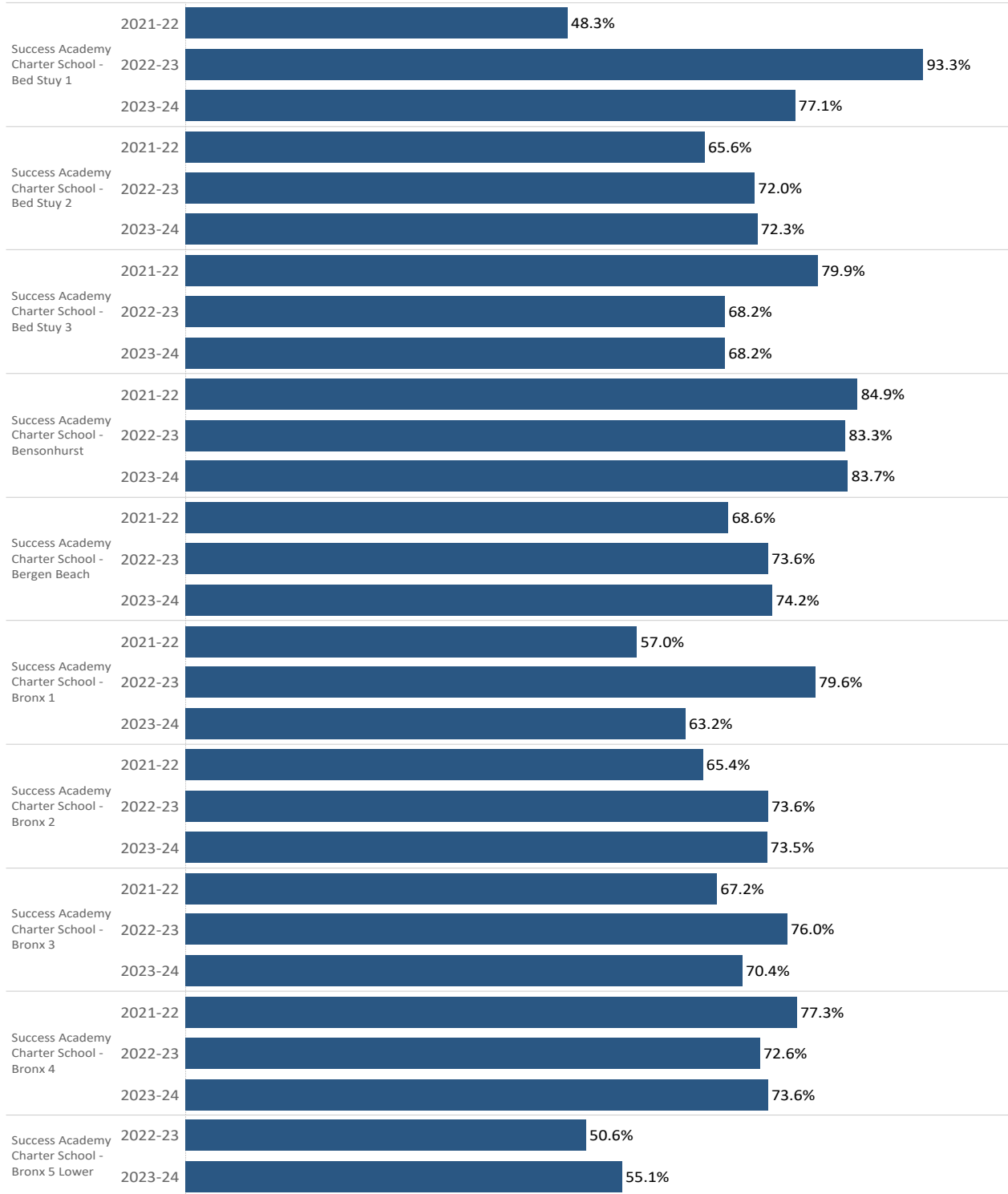
SACS NYC board members possess a diverse skill set that supports strong governance and rigorous oversight focused on student outcomes. Though deeply knowledgeable about the schools’ educational program, progress toward meeting Accountability Plan goals, enrollment levels, and facility plans, the board maintains appropriate distance from the day-to-day management of each school, which it delegates to Success Academy. The board establishes clear priorities to support the education program, and monitors progress toward achieving these goals while holding the network and school leaders accountable for student achievement with annual evaluations.

The board requires detailed reports on schools' academic, financial, and operations data from Success Academy prior to each of its board meetings. It reviews these reports thoroughly for clear understanding of individual school status and of the education corporation as a whole. In addition to these written reports, the board receives information directly from network leaders in presentations specific to individual schools on matters such as student performance, student attendance, or staff member concerns. The board also receives information on litigation and other legal matters from Success Academy counsel except in cases where a potential conflict exists. In such cases, the board retains separate counsel. The board clearly understands the schools' Accountability Plan goals and the multiple performance measures within each goal. The board directs an abundance of resources to schools to ensure high levels of student achievement. The board works with the network to ensure schools have what they need to support and retain high quality teachers and purchase technology and other learning tools to implement the SACS NYC program with fidelity.

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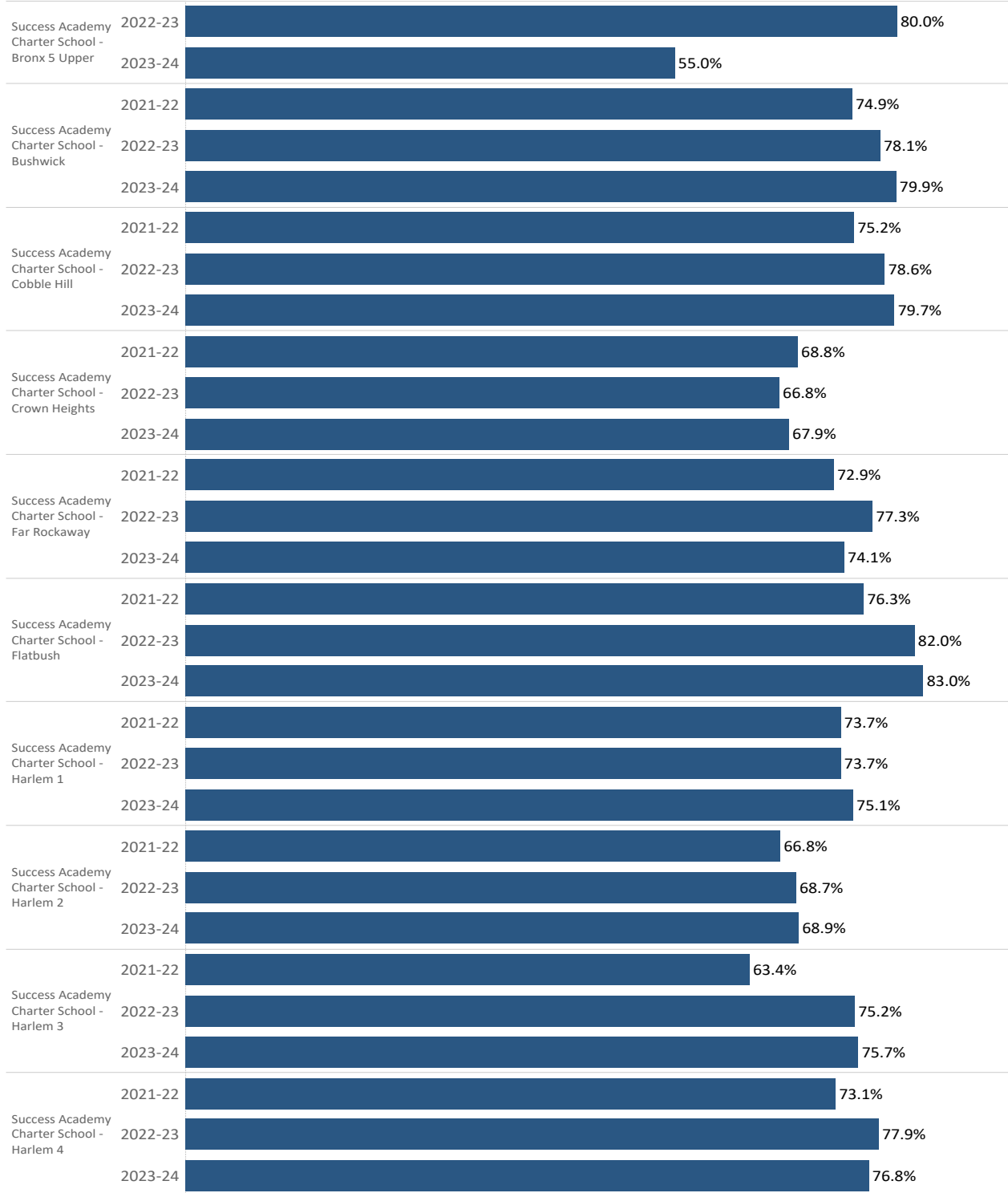


**EDUCATION CORPORATION PERSISTENCE IN ENROLLMENT**



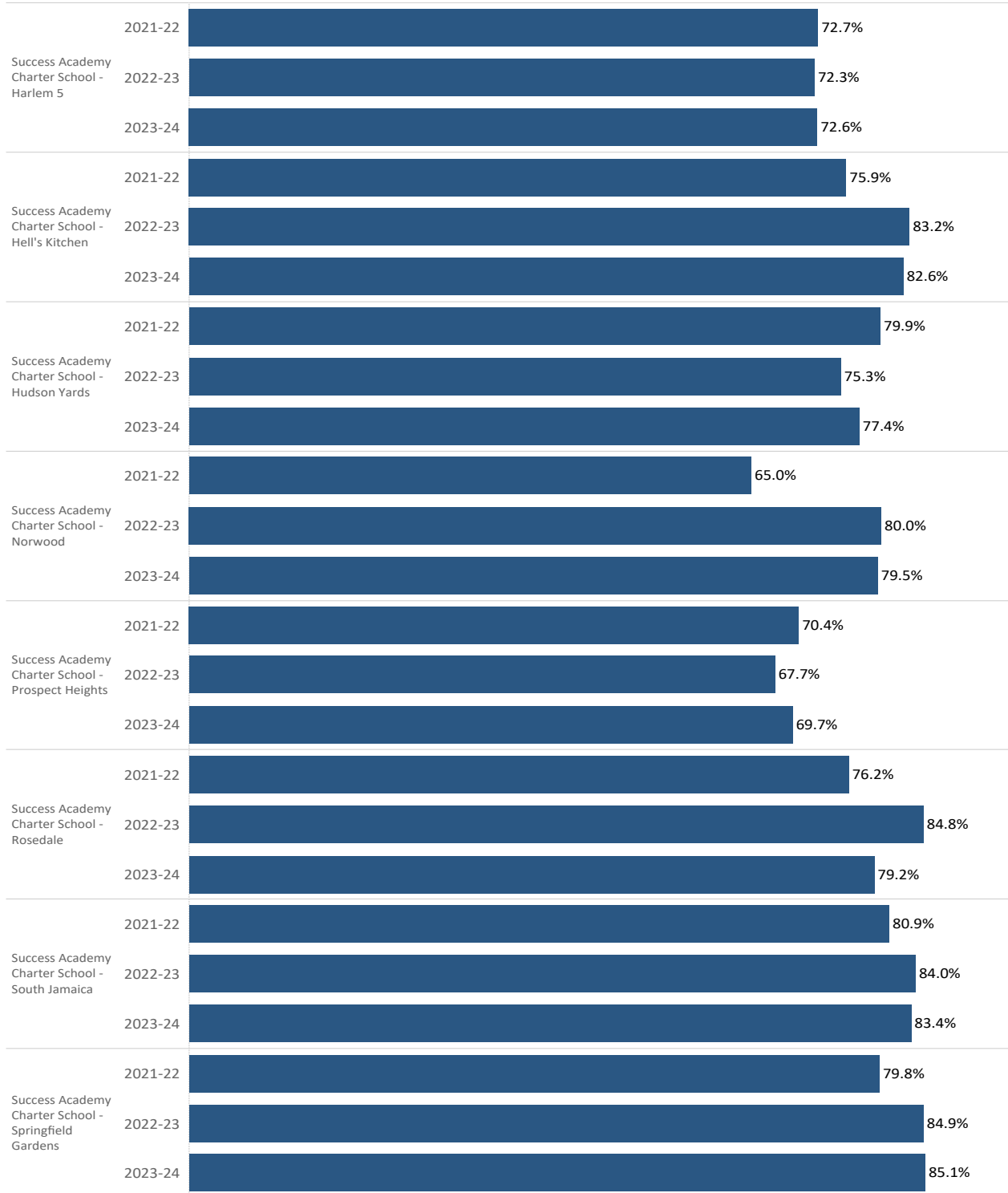


EDUCATION CORPORATION PERSISTENCE IN ENROLLMENT



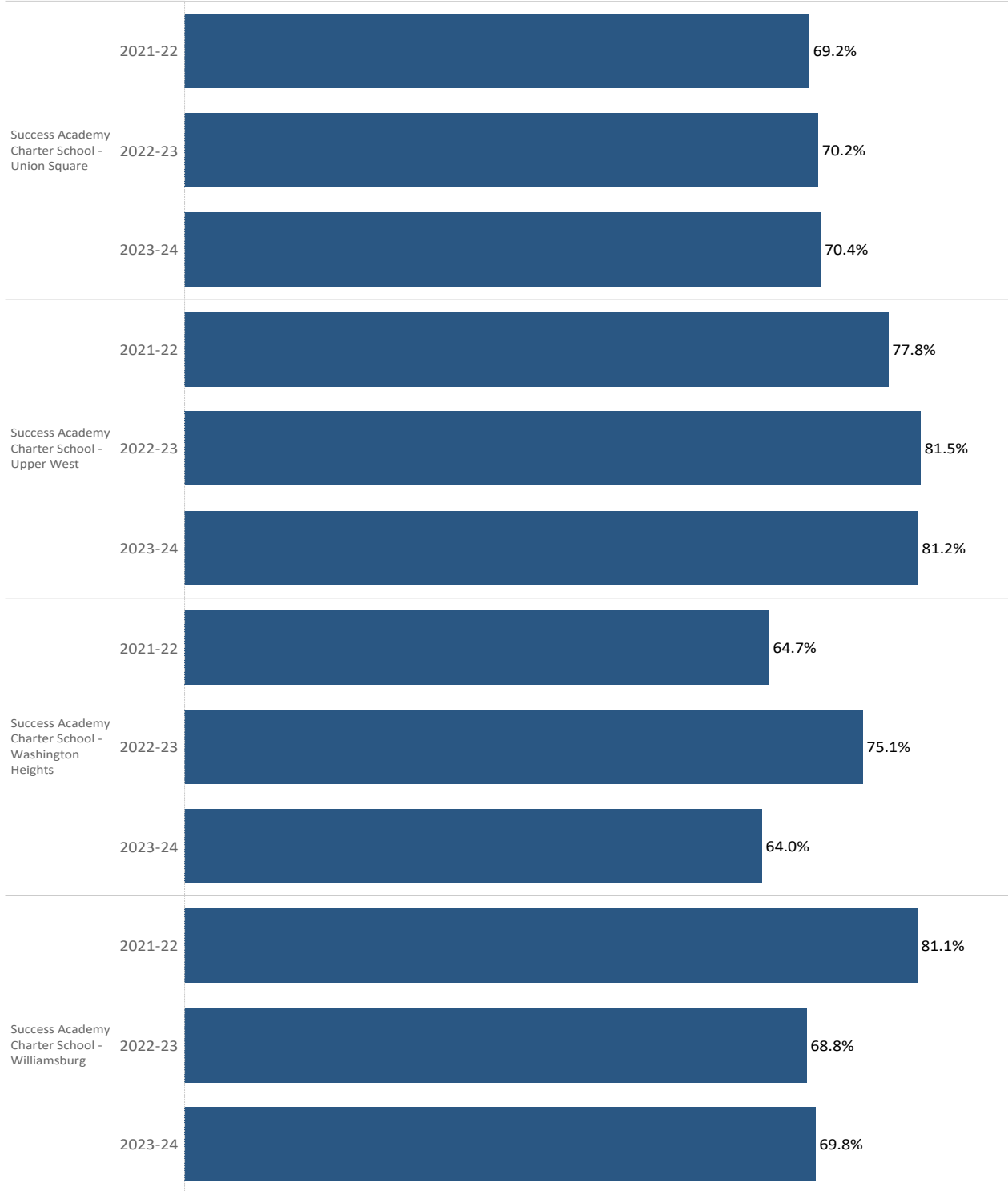


EDUCATION CORPORATION PERSISTENCE IN ENROLLMENT





**EDUCATION CORPORATION PERSISTENCE IN ENROLLMENT**





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



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



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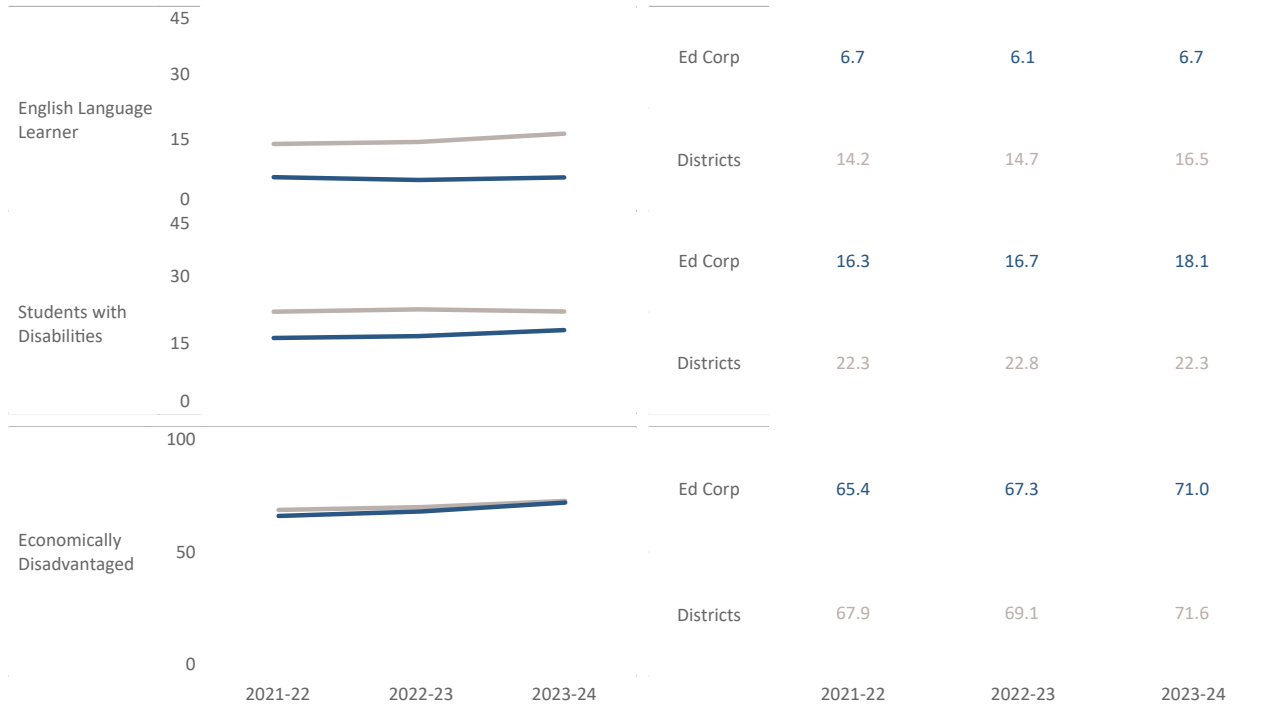


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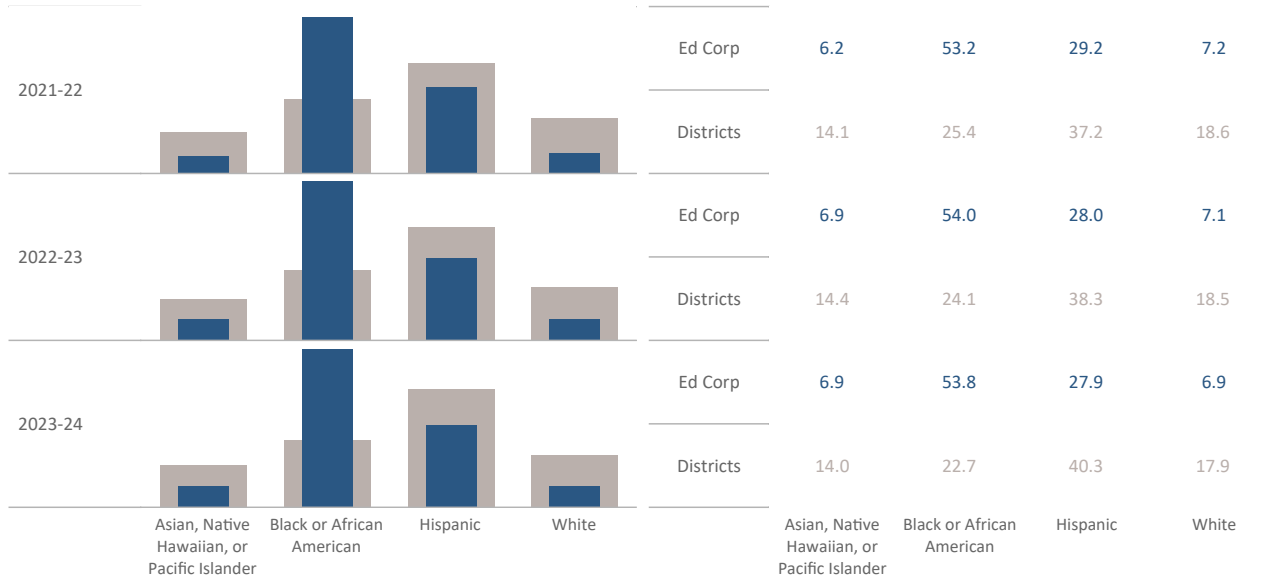


## Success Academy Charter Schools - NYC Aggregate Education Corporation Enrollment

### Aggregate Education Corporation Demographics: Sub populations



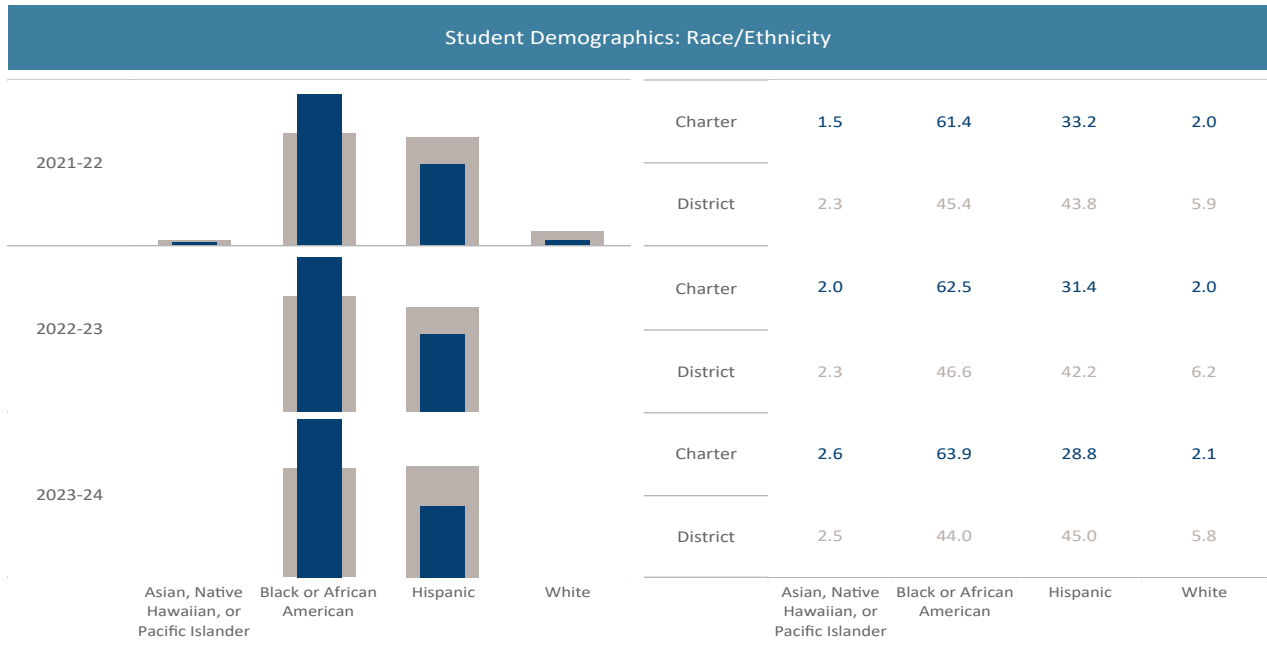
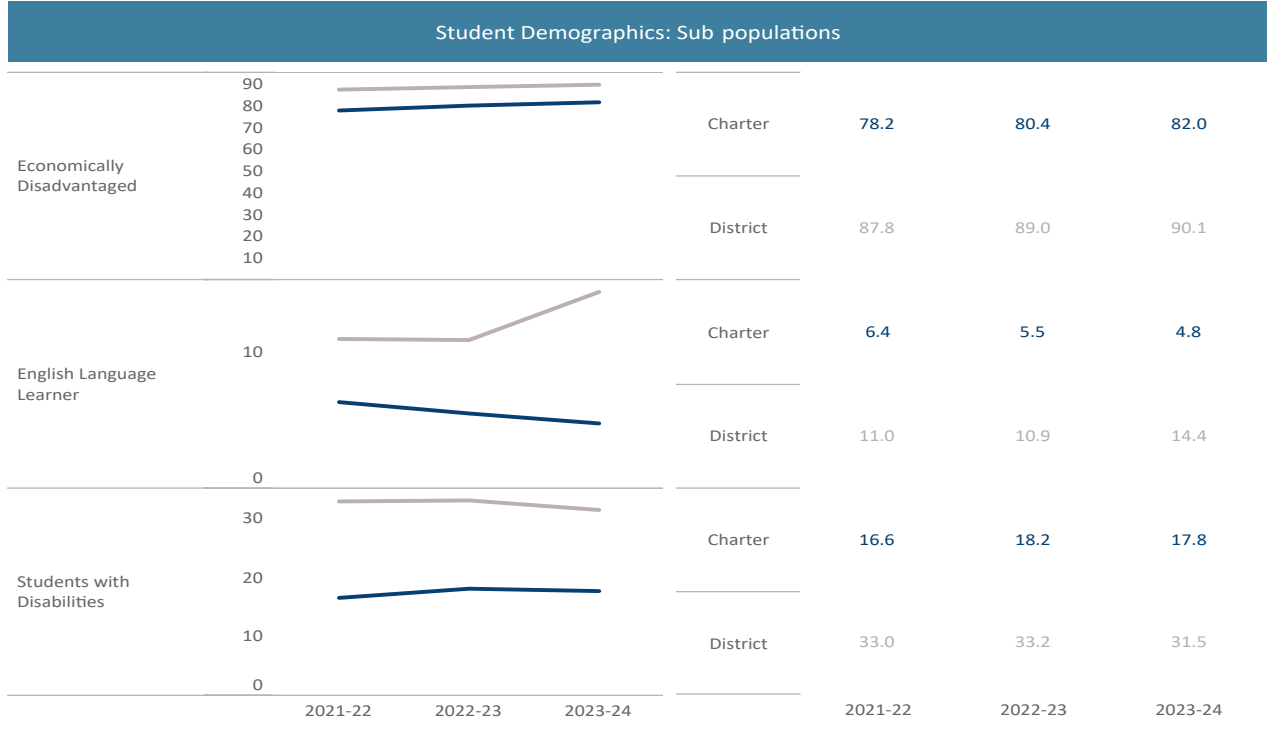
### Aggregate Education Corporation Demographics: Race/Ethnicity





Success Academy Charter School - Harlem 5

Manhattan CSD 5

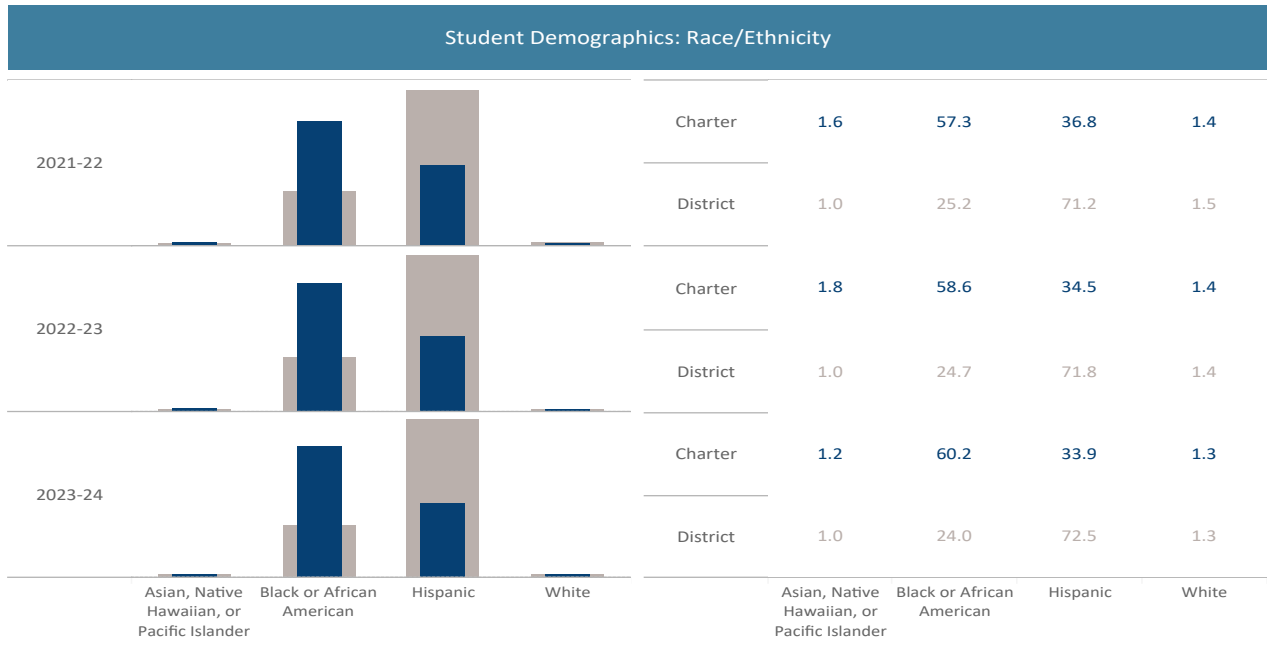
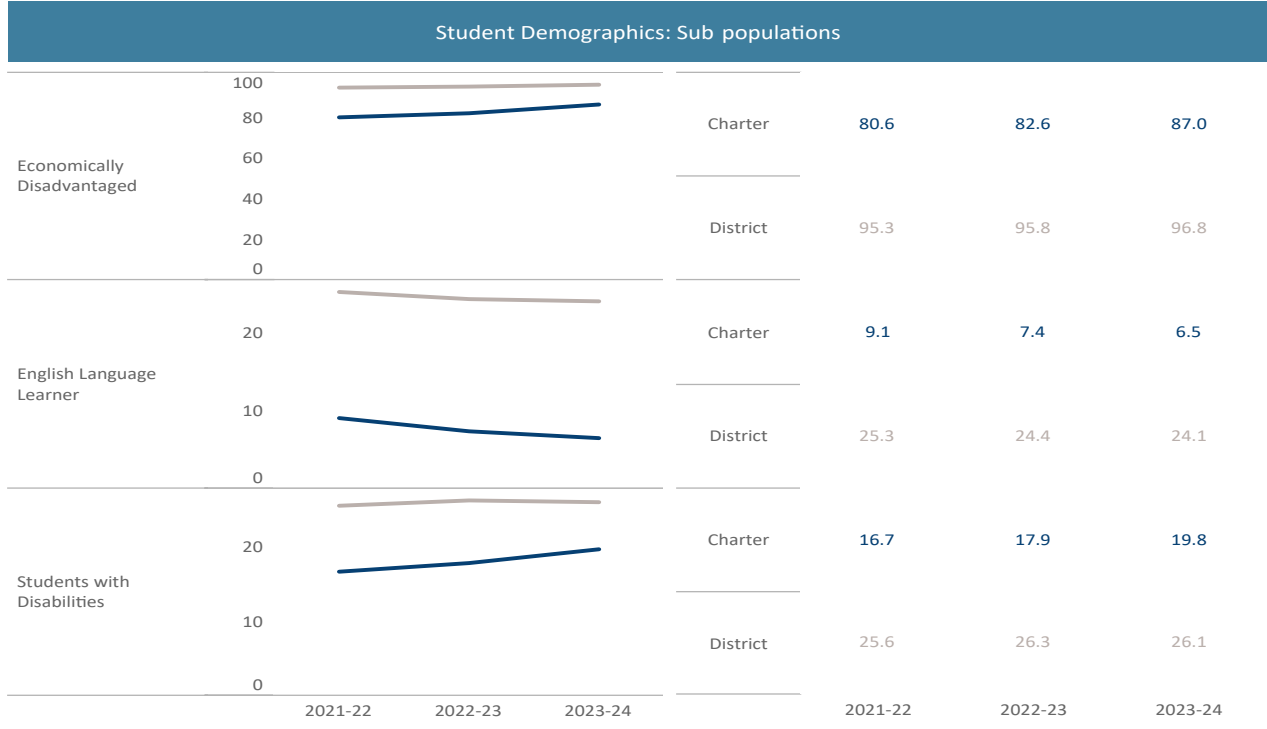


\* Data reported in these charts reflect BEDS day enrollment counts as reported by the New York State Education Department ("NYSED").



Success Academy Charter School - Bronx 2

Bronx CSD 9

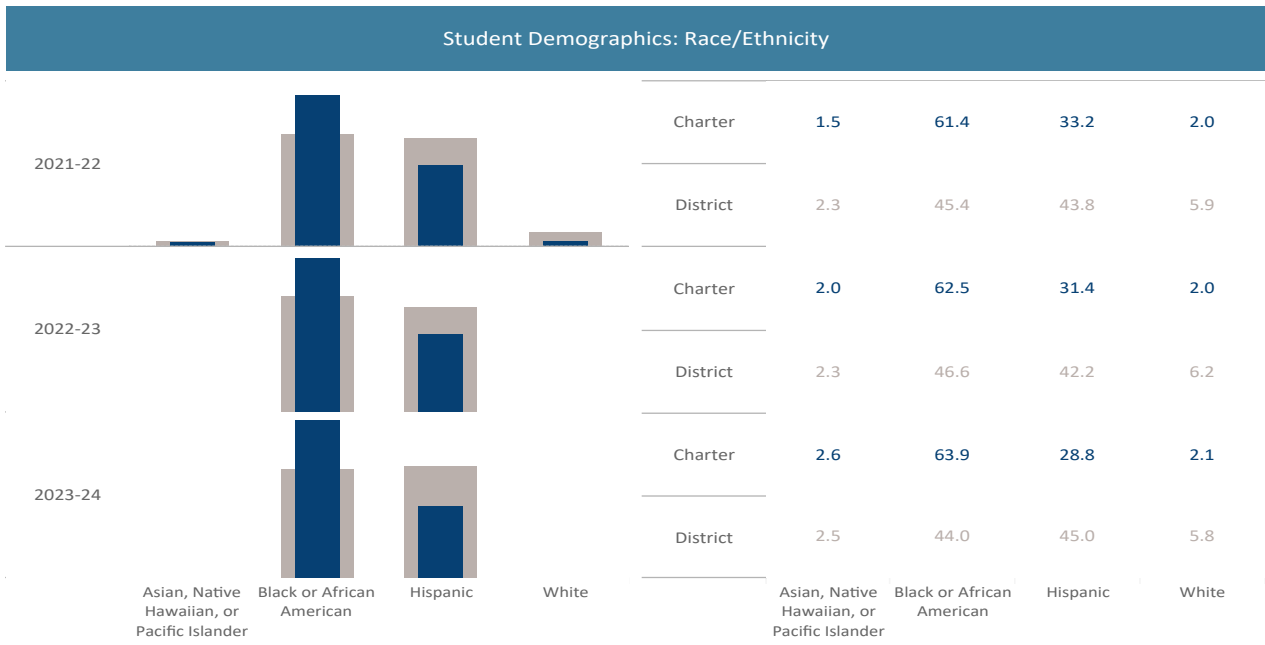
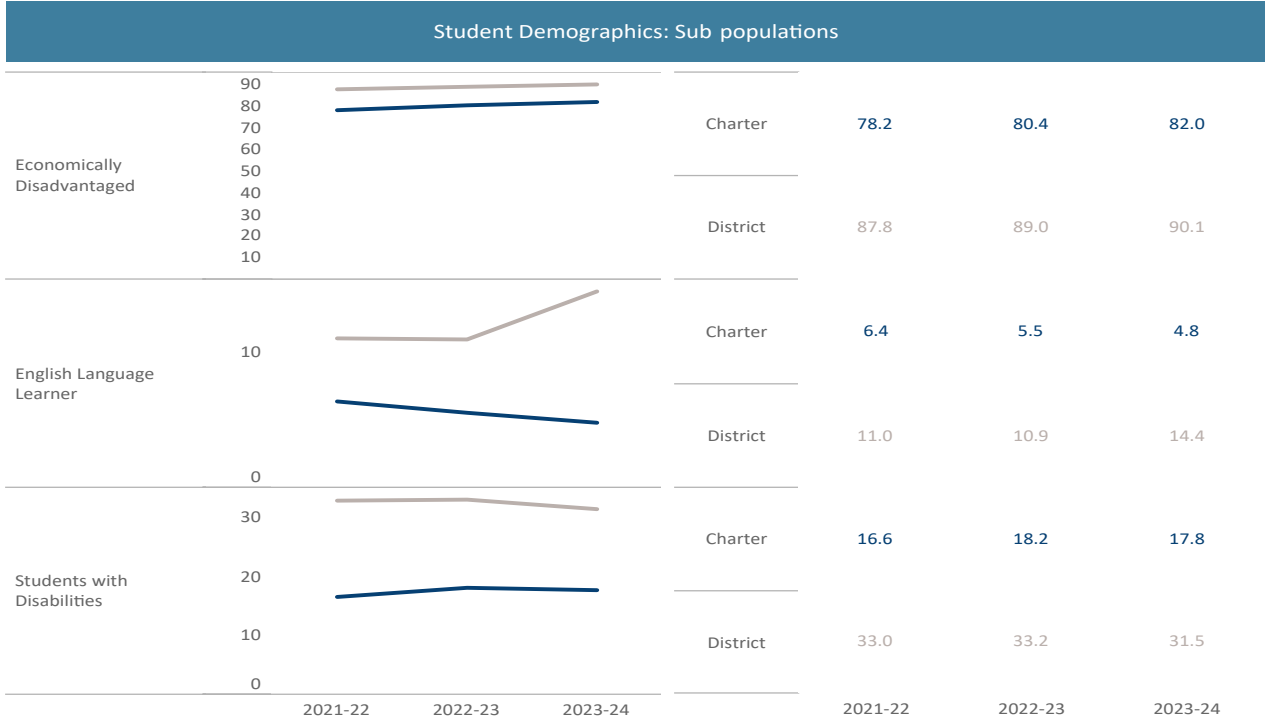


\* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED.



Success Academy Charter School - Harlem 5

Manhattan CSD 5



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

## FISCAL BENCHMARKS SUMMARY



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

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

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

### DOES THE EDUCATION CORPORATION MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

*The education corporation maintains appropriate internal controls and procedures, which are implemented by each charter. The following elements are generally present:*

INDICATORS	EVIDENT?
The education corporation has a history of sound fiscal policies, procedures and practices, and appropriate internal controls at each charter.	+
The most recent education corporation audit report, which covers fiscal operations for each charter, 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?
<p>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 FPPM be reviewed and updated on an annual basis.</p>	<p><b>FEBRUARY 2022</b></p>

## DOES THE EDUCATION CORPORATION COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

*The education corporation complies with financial reporting requirements by providing the SUNY Trustees and NYSED with required financial reports that are on time, complete, and follow generally accepted accounting principles. The education corporation has filed the following reports, which include information about each charter, 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 for the charter to ensure stable operations. Critical financial needs of the charter are not dependent on variable income (grants, donations, and fundraising). The following elements are generally present:*

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

The institute is not concerned with the liquid reserves used to fund expenses given the strong financial track record of the education corporation since inception.



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