

THE SUNY CHARTER SCHOOLS INSTITUTE

*RENEWAL RECOMMENDATION REPORT
ZETA CHARTER SCHOOLS - NEW YORK
CITY'S AUTHORITY TO OPERATE:*

*ZETA CHARTER SCHOOL - BRONX MOUNT EDEN
ZETA CHARTER SCHOOL - BRONX TREMONT PARK*

*REPORT DATE: APRIL 2, 2025
VISIT DATE: DECEMBER 9 – 10, 2024*



Charter Schools Institute
The State University of New York

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EDUCATION CORPORATION BACKGROUND

ZETA CHARTER SCHOOLS - NEW YORK CITY



MISSION

Zeta is on a mission to ensure that every child in America has access to the highest-quality, free education, from pre-Kindergarten to 12th grade.

EDUCATION CORPORATION BACKGROUND

Zeta Charter Schools- New York City (“Zeta Schools NYC” or the “education corporation”) has seven SUNY authorized charters, with four currently open and operating: Zeta Charter School- Bronx Mount Eden (“Zeta Mount Eden”), Zeta Charter School- Bronx Tremont Park (“Zeta Tremont Park”), both of which are under renewal review; Zeta Charter School- Inwood (“Zeta Inwood”); and, Zeta Charter School- South Bronx (“Zeta South Bronx”).

The education corporation contracts with the charter management organization (“CMO”) Zeta Charter Schools, Inc. (“Zeta” or the “network”), a Delaware-based not-for-profit corporation, which provides Zeta Schools NYC with support in the areas of curriculum design, professional development, operations, finance, and legal oversight. The CMO uses its experienced network leadership to closely manage schools, facilitating the realization of the education corporation’s key design elements through rigorous academic program implementation.

Zeta Schools NYC also contracts with the New York City Department of Education (“NYCDOE”) to provide a universal pre-Kindergarten (“pre-K”) program at each charter school. State statute requires the Institute to conduct ongoing monitoring of full day universal pre-K programs at all SUNY authorized charter schools. The SUNY Charter Schools Institute (the “Institute”) evaluated Zeta Tremont Park’s and Zeta Mount Eden’s pre-K programs at the same time as the renewal review. The Institute team finds the programs meet the statutory requirements. The programs partner with AppleTree Institute to provide high quality curricular programs and general support.

CURRENT EDUCATION CORPORATION SNAPSHOT

First School Opened:
2018

Total Number of Charters:
7

Number of Students Served:
3,012

PROPOSED FUTURE EDUCATION CORPORATION SNAPSHOT

Serves: Kindergarten – 10th

Total Number of Charters:
7

Number of Students Served:
6,615

Information about each charter is found on the following page.

EDUCATION CORPORATION BACKGROUND

Zeta Charter School - Bronx Mount Eden



Opening Year: 2020

Current Enrollment/Grades: 658 | K-4

Future Enrollment/Grades: 1,243 | K-9

Zeta Bronx Mount Eden Early Childhood School | 1325 Jerome Ave, Bronx, New York | CSD 9 | K | Mount Eden

Zeta Bronx Mount Eden Elementary School | 1475 Macombs Rd, Bronx, New York | CSD 9 | 1-4 | Mount Eden

Zeta Charter School - Bronx Tremont Park



Opening Year: 2020

Current Enrollment/Grades: 718 | K-4

Future Enrollment/Grades: 1,445 | K-9

Zeta Bronx Tremont Park Elementary School | 1910 Arthur Ave, Bronx New York | CSD 12 | K-4 | Tremont Park

ZETA CHARTER SCHOOLS - NEW YORK CITY BOARD OF TRUSTEES¹

CHAIR

Keri Hoyt

SECRETARY

Nicole Brisbane

TRUSTEES

Kenneth M. McClure

Michele Caracappa

Tyrone Davis III

ZETA CHARTER SCHOOLS BOARD OF TRUSTEES

CHAIR

Allen Thorpe

TRUSTEES

Ope Bukola

Alicia Hammarskjold

Jenny Sedlis

Boaz Weinstein

Rick Schnall, Ex-Officio

* New York City Community School District ("CSD")

Please note, under the Act, each charter school is permitted to educate students from Kindergarten through 12th 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.

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



EDUCATION CORPORATION BACKGROUND

KEY DESIGN ELEMENTS

Rigorous, hands-on academics; +

Mind, body, soul cultivation; +

Innovation culture; and, +

Wow through family service, by developing close family partnerships. +

“+” : This indicator is generally present.

“-” : This indicator is generally not present.

EXECUTIVE SUMMARY

FULL-TERM RENEWAL

Renewal through 2029-30. *The SUNY Charter Schools Institute (the “Institute”) recommends the SUNY Trustees’ Charter Schools Committee approve the Applications for Charter Renewal:*

- *Zeta Charter School - Bronx Mount Eden; and,*
- *Zeta Charter School - Bronx Tremont Park.*

If each school is renewed, Zeta Schools NYC will be granted the authority to continue to operate each charter through 2029-30 with 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 based on each charter meeting the criteria for renewal set forth in the Policies for the 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 (“SUNY Renewal Policies”).²

REVISION REQUEST

Zeta Schools NYC is requesting approval from the SUNY Trustees to continue the growth trajectory already established at the two schools for renewal. Each school would continue to grow by one grade level each year until enrolling students in Kindergarten – 9th grade at the end of the next charter term, if approved. Zeta Schools NYC currently operates high performing middle school programs at Zeta Inwood and Zeta South Bronx. Both Zeta Tremont Park and Zeta Mount Eden will replicate those programs.

EXECUTIVE SUMMARY

Zeta Schools NYC operates four successful schools in New York. Each school’s program prioritizes instilling a love of learning in its students. Within a joyful and student-centered culture, leaders at each school and the CMO promote the purposeful use of assessment data to drive instructional decisions; high quality curricular materials; the close, clinical coaching of teachers; and, high expectations for teachers and leaders.

Along with strong academics, Zeta Schools NYC boasts partnerships with arts organizations like Ballet Hispanico that expose scholars to fine arts created and performed by New York City based artists of color. New in 2024-25, Zeta Schools NYC’s artist in residence program features award winning musicians and actors who perform for, mentor, and teach Zeta Schools NYC’s scholars.

The education corporation’s Z Combinator program supports the development of the next generation of effective school leaders to launch high quality charter schools across the country. The Z Combinator experience imbues new school leaders with the tools, mindset, and skills to navigate the challenges of starting a school. The program provides the support and development to new school leaders during the crucial early phase of school development and through the opening period. In alignment with Zeta Schools NYC’s mission to ensure every child in America has access to a free, high-quality education, participants from across the country join Z Combinator cohorts to hone their leadership skills.

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

EXECUTIVE SUMMARY

FINDINGS & INFORMATION

Is the education corporation an academic success?

Zeta Tremont Park and Zeta Mount Eden are each academic successes having met their Accountability Plan goals in English language arts (“ELA”) and mathematics. The Institute observed consistently high quality instruction across classrooms featuring students thinking critically about learning and participating in rich academic discussions. The schools demonstrate success in the following ways:

- Both schools under renewal review demonstrated particularly high achievement in mathematics. In 2023-24, Zeta Tremont Park outperformed 99% of public schools statewide, and Zeta Mount Eden outperformed over 96% of public schools statewide.
- Zeta Tremont Park and Zeta Mount Eden posted high achievement in ELA that exceeded the district results by 33 percentage points and 30 percentage points, respectively.
- In mathematics, Zeta Tremont Park outperformed the district by 62 percentage points, and Zeta Mount Eden outperformed the district by 49 percentage points.

Is the education corporation an effective, viable organization?

Zeta Schools NYC and the two schools it operates that are under renewal consideration, Zeta Mount Eden and Zeta Tremont Park, are viable and effective organizations. Along with the network, the leadership teams at the schools provide guidance, support, and curricular materials. Leaders run effective operational processes to ensure high quality, rigorous instruction. The network developed the necessary structures and procedures and undergirded them with sufficient resources to ensure a continuous cycle of instruction, evaluation, and adjustment that yielded exemplary academic achievement during each school’s first charter term. The education corporation board provides effective oversight over the growing portfolio of schools. With expansion efforts in Queens, the education corporation board is working to adapt its oversight and governance skills to monitor across boroughs and more schools.

Is the education corporation fiscally sound³?

Zeta Schools NYC is fiscally sound based on the Institute’s review of the renewal documentation. The education corporation established a sound budget projecting method that reflects reasonable and achievable projections and fiscal goals. The education corporation’s finance team meets quarterly with the board to discuss results and monitor variances. Zeta Schools NYC maintains strong enrollment numbers throughout the current charter term and maintains adequate revenues to cover its expenses. The education corporation had no material weaknesses or internal control issues in the 2023-24 annual financial audit and preserves a separate dissolution account with the appropriate amounts as required by the charter agreement.

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

Zeta Schools NYC demonstrated strong financial performance during the current charter term, with net assets (\$17.4 million) and cash (3.3 months on hand) reserves growing each year. It has consistently achieved adequate scores across all fiscal metrics tracked by the Institute throughout the term. The education corporation maintains consistent teacher to student ratios throughout the current charter term and adjusts when necessary. The network prioritizes spending on curriculum improvements, student technology, new facilities, and student transportation to accommodate students traveling to its new facilities.

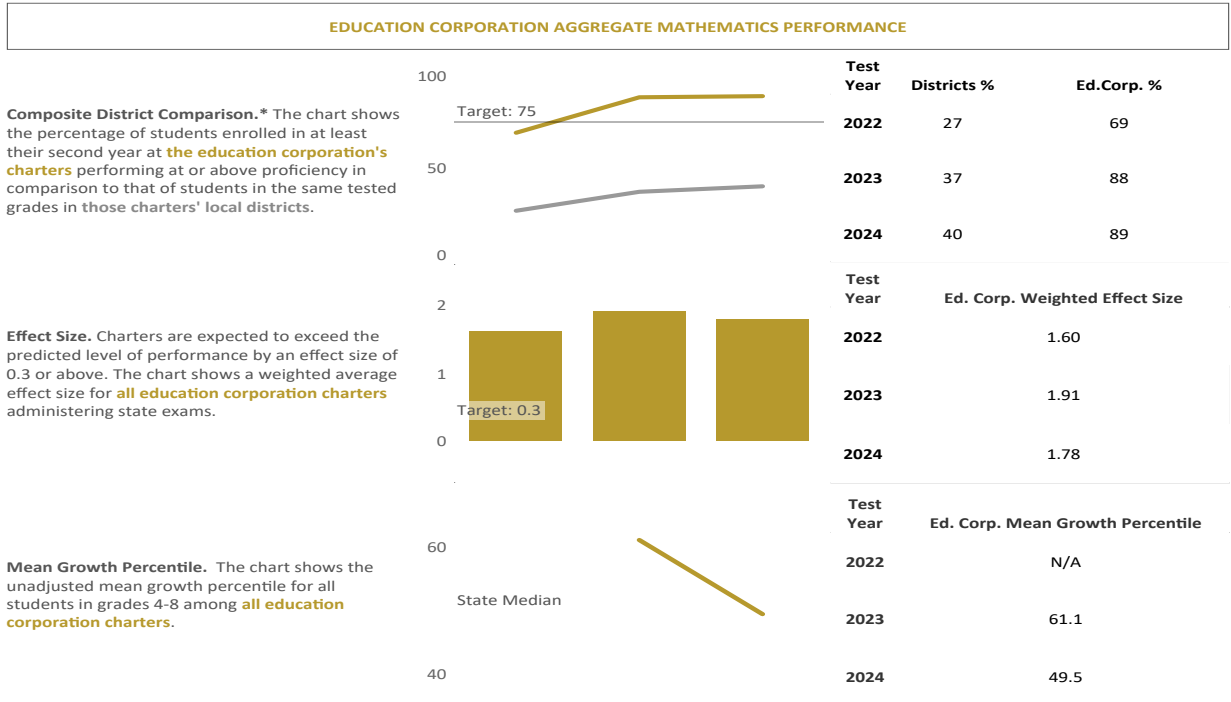
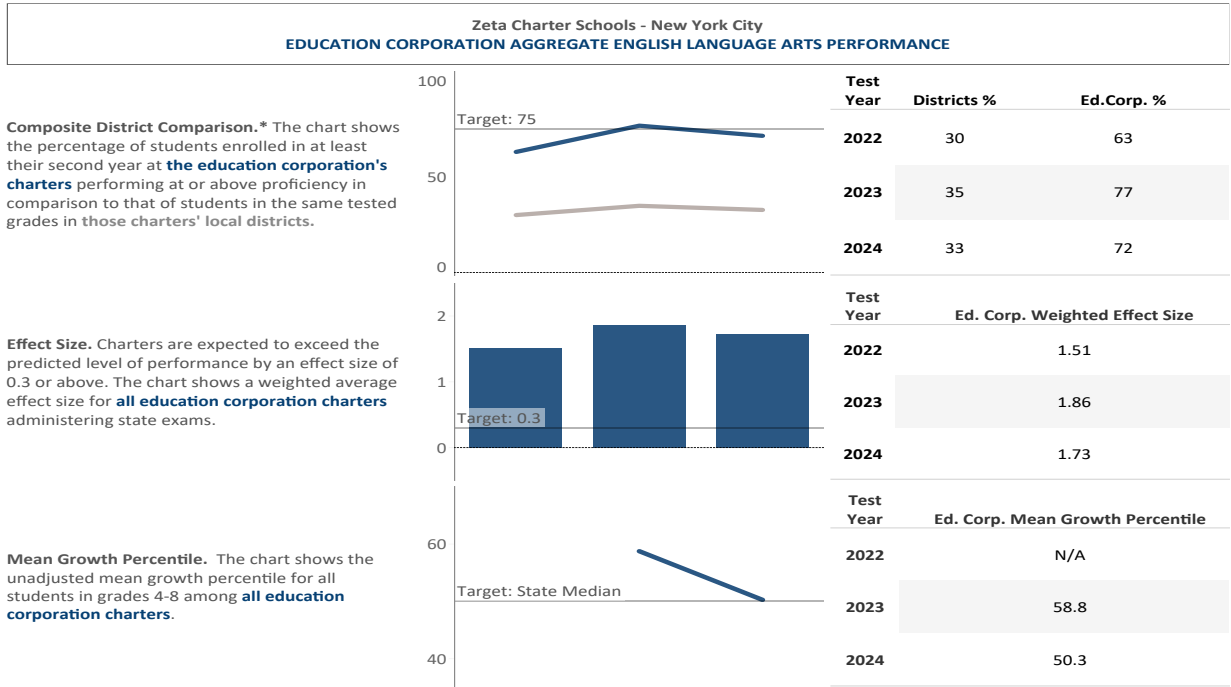
If the SUNY Trustees renew each charter, are the education corporation's plans for each charter reasonable, feasible, and achievable?

If renewed, the schools' plans for the future are reasonable, feasible, and achievable. Zeta Schools NYC operates four successful schools in New York City and plans to open three new schools in 2025-26. Zeta Tremont Park and Zeta Mount Eden will continue their growth trajectory to expand to serve Kindergarten – 9th grade by the end of the next charter term. The schools will implement the same high quality elements found at other Zeta Schools NYC middle school programs. As the education corporation replicates into Queens, the network will also increase its capacity to manage additional schools.

Zeta Schools NYC proposes a reasonable and achievable budget plan for the next charter term and will continue to be a financial success in the next charter term.

EDUCATION CORPORATION OVERVIEW

ZETA CHARTER SCHOOLS - NEW YORK CITY: AGGREGATE ELA AND MATHEMATICS PERFORMANCE FOR ALL CHARTERS

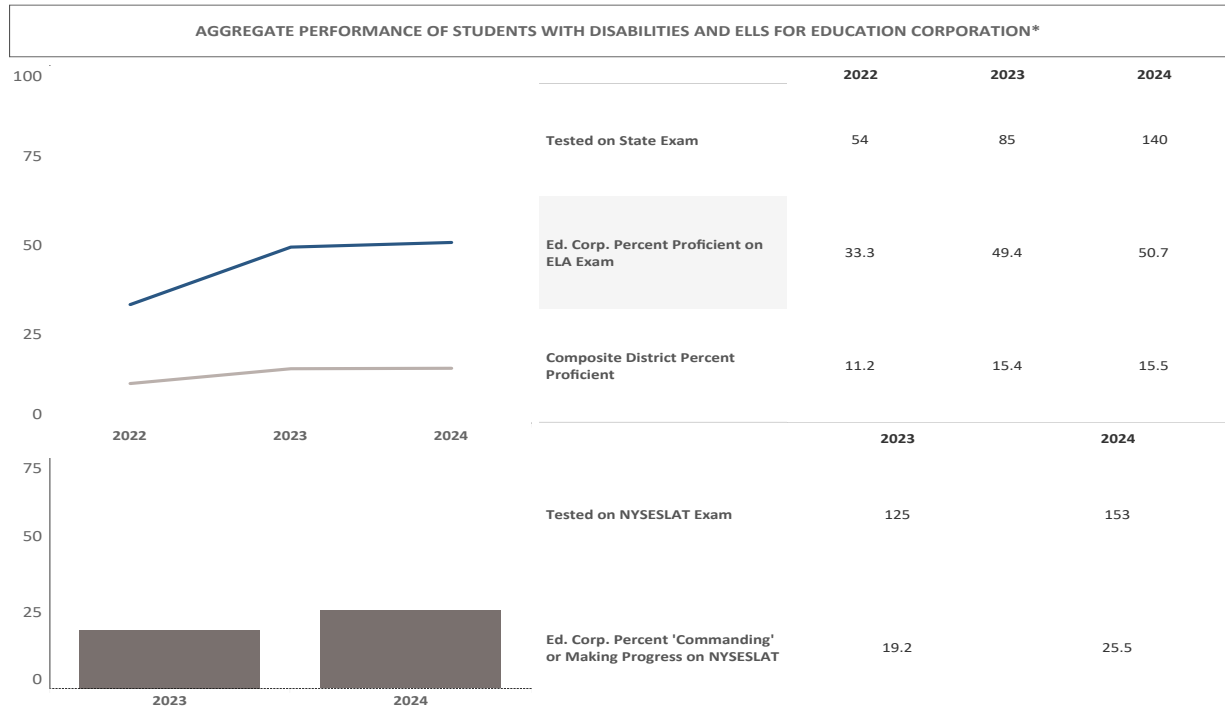
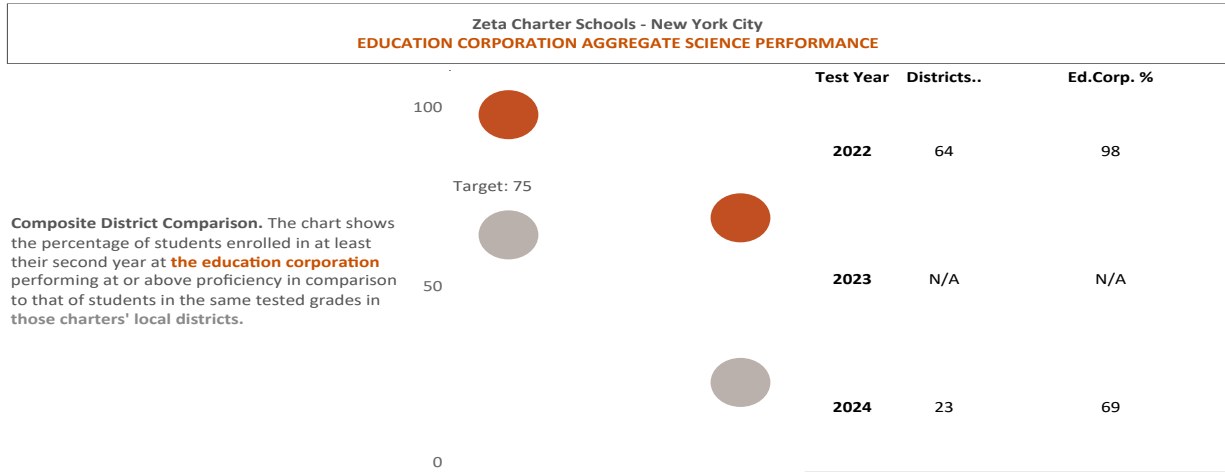


* The composite district comparison is a weighted proficiency rate including all comparison grades from Districts/New York City Community School Districts ("CSDs") in which a charter in the education corporation is located. The data reflect results for all charters in the education corporation that have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



EDUCATION CORPORATION OVERVIEW

ZETA CHARTER SCHOOLS - NEW YORK CITY: AGGREGATE SCIENCE PERFORMANCE FOR ALL CHARTERS

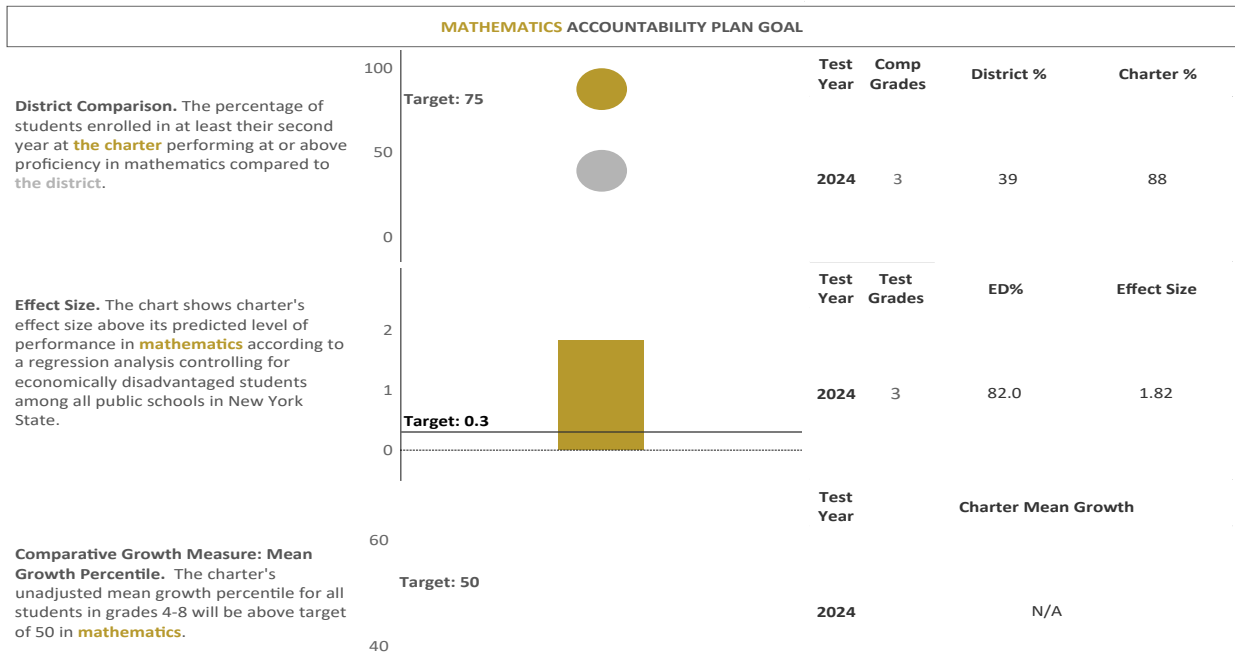
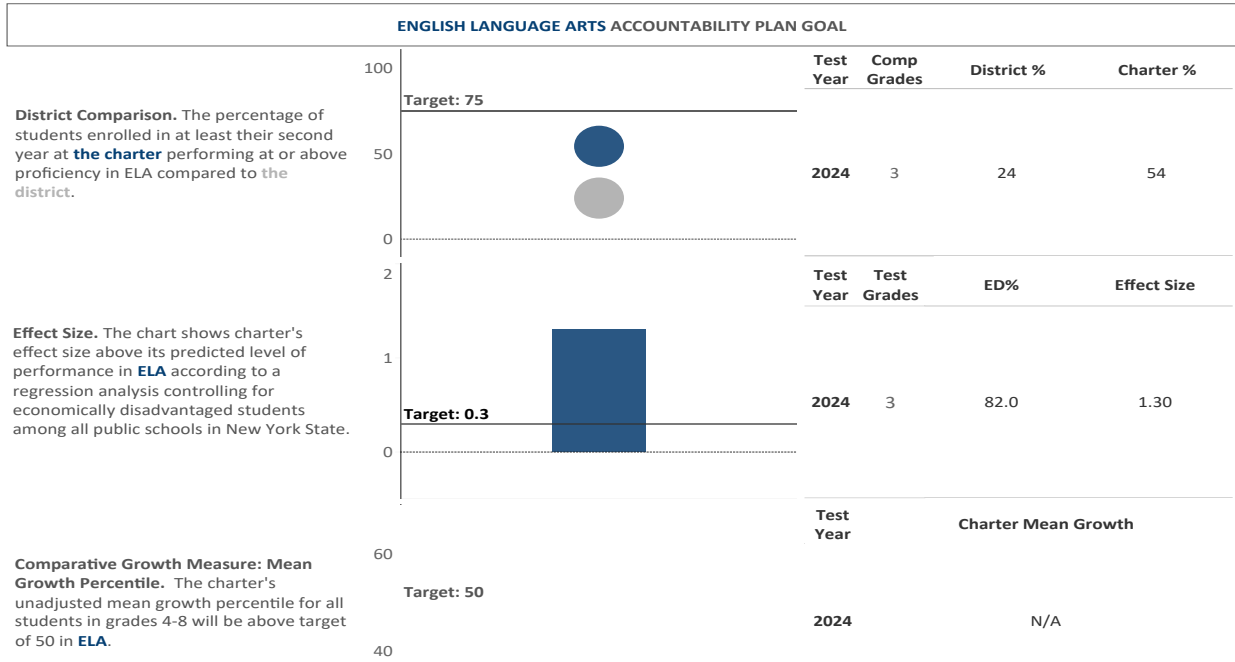


*The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in a charter's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam. "Making 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.



ACADEMIC PERFORMANCE

ZETA CHARTER SCHOOL - BRONX MOUNT EDEN



ACADEMIC PERFORMANCE

ZETA CHARTER SCHOOL - BRONX MOUNT EDEN

SCIENCE ACCOUNTABILITY PLAN GOAL

Science: **Comparative Measure.** The percentage of students at **the charter** in at least their second year performing at or above proficiency in science compared to the district.

N/A

TESTED PERCENTAGES

	2024	
	ELA	Math
School Tested Number	53	55
School Tested %	96.4%	100.0%
District Tested %	81.1%	85.8%

SPECIAL POPULATIONS PERFORMANCE*

	2024
Students with Disabilities Tested on State Exam	14
Charter Percent Proficient on ELA Exam	42.9
District Percent Proficient	12.6
Tested on NYSESLAT Exam	86
Charter Percent "Commanding"***	2.3

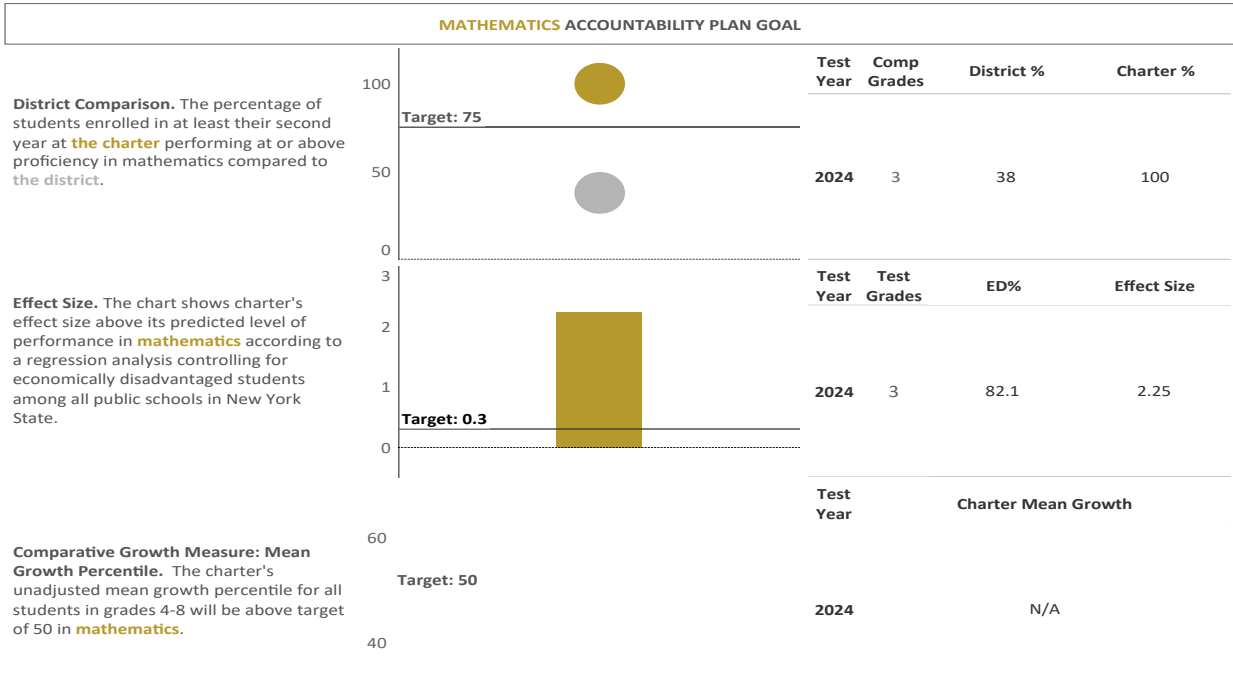
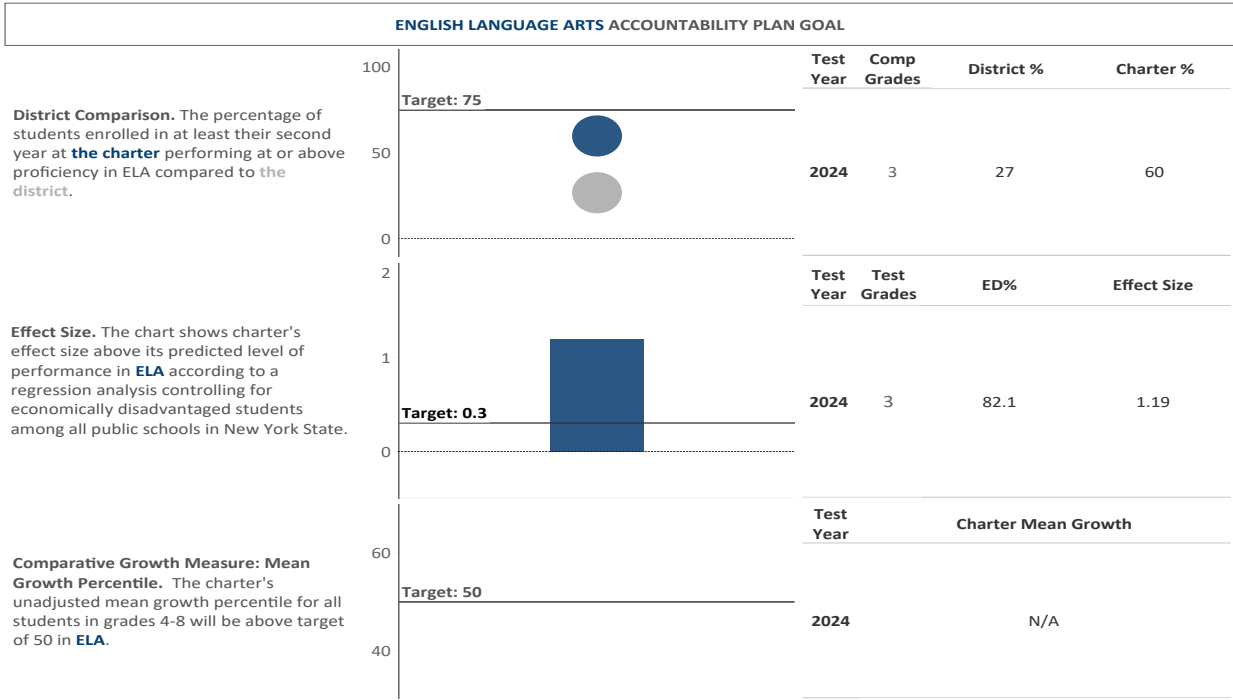
* The academic outcome data about the performance of students receiving special education services and English language learners ("ELLs") above is not tied to separate goals in the charter school's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, 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".

**Due to error in student level data availability, NYSESLAT performance reflects percent of students that performed at "Commanding" level in the 2023-24 as available on data.nysed.com.



ACADEMIC PERFORMANCE

ZETA CHARTER SCHOOL - BRONX TREMONT PARK





ACADEMIC PERFORMANCE

ZETA CHARTER SCHOOL - BRONX TREMONT PARK

SCIENCE ACCOUNTABILITY PLAN GOAL

Science: Comparative Measure. The percentage of students at **the charter** in at least their second year performing at or above proficiency in science compared to the district.

N/A

TESTED PERCENTAGES

	2024	
	ELA	Math
School Tested Number	54	54
School Tested %	96.4%	96.4%
District Tested %	86.2%	91.0%

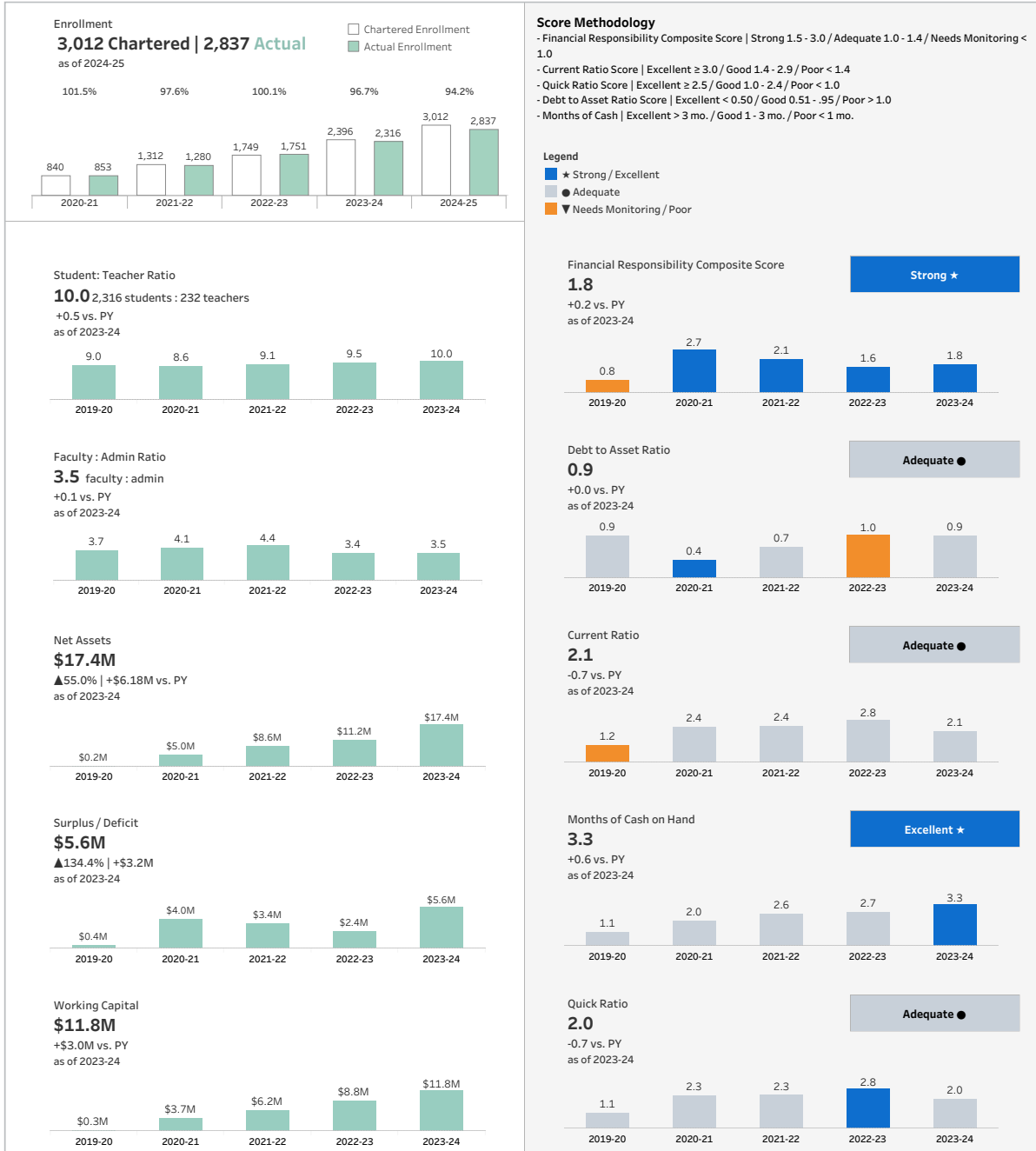
SPECIAL POPULATIONS PERFORMANCE*

	2024
Students with Disabilities Tested on State Exam	4
Charter Percent Proficient on ELA Exam	0.0
District Percent Proficient	10.4
Tested on NYSESLAT Exam	33
Charter Percent 'Commanding' or Making Progress	6.1

* 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".

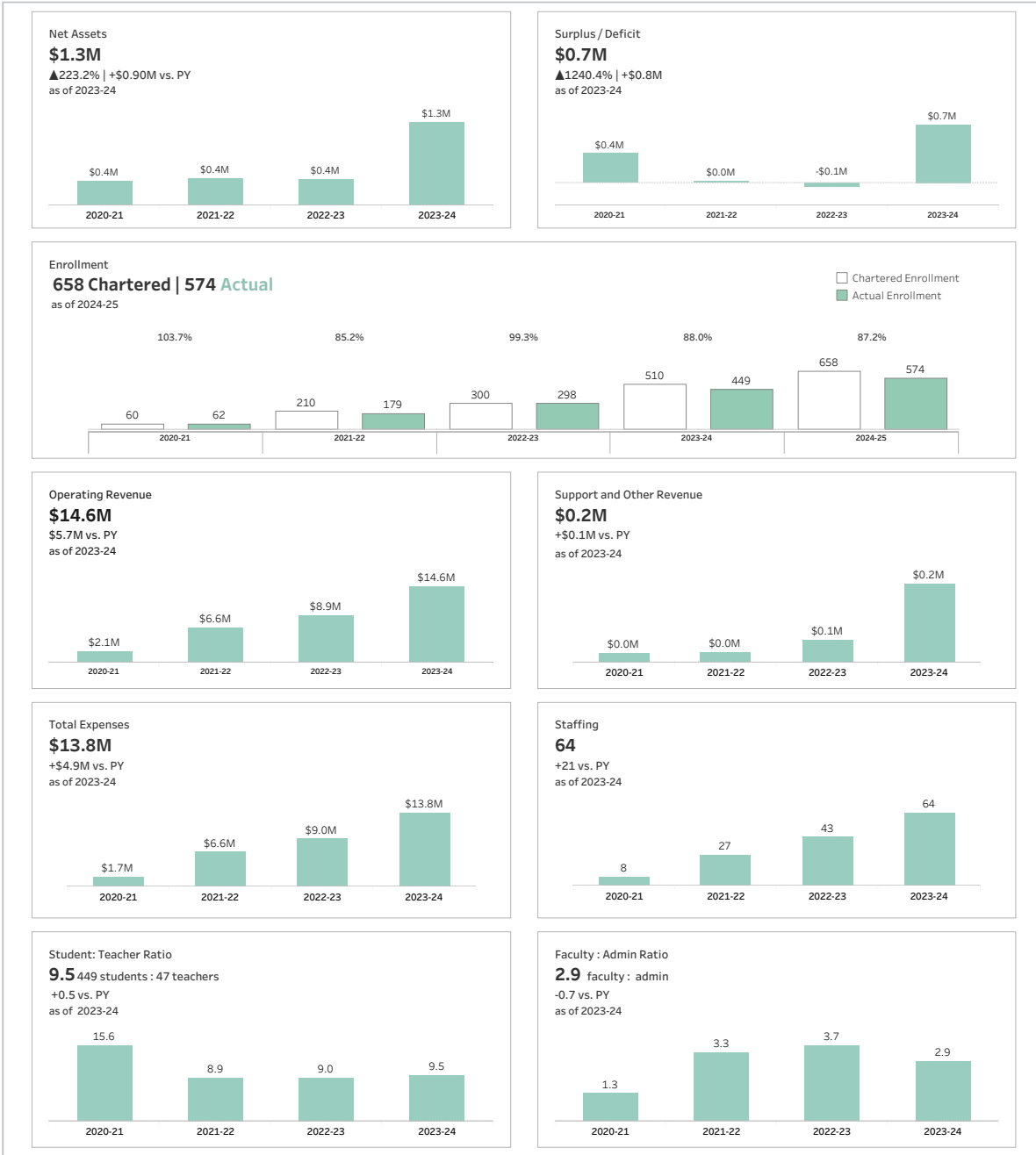
FISCAL DASHBOARD

ZETA CHARTER SCHOOLS - NEW YORK CITY



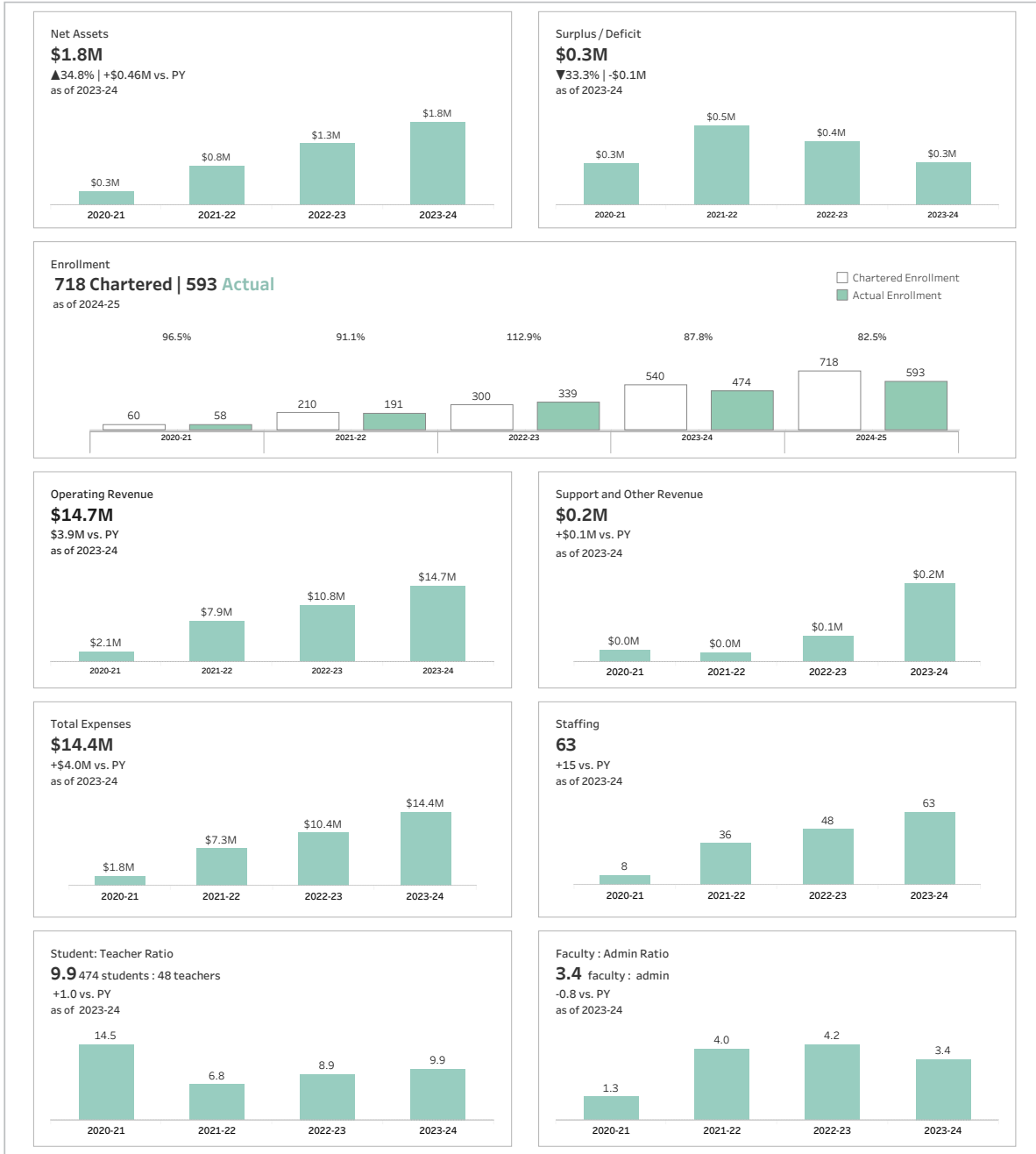
FISCAL DASHBOARD

ZETA CHARTER SCHOOLS - BRONX MOUNT EDEN



FISCAL DASHBOARD

ZETA CHARTER SCHOOLS - BRONX TREMONT PARK



COMPLIANCE REPORTING



HAS EACH CHARTER DUE FOR RENEWAL 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.

ZETA SCHOOLS NYC

Annual Reports

The education corporation submitted annual reports to the Institute and the New York State Education Department (“NYSED”) on time but has not posted the most recent reports directly on the website as required by the New York State Charter Schools Act of 1998 (the “Act”). The Institute will ensure compliance prior to the start of the next charter term.

Board Meetings and Minutes

The education corporation needs to post board meeting materials and minutes to its website. The Institute will ensure compliance prior to the start of the next charter term.

FOIL

The education corporation has a complete Freedom of Information Law (“FOIL”) policy and notice, but the subject matter list requires minor revision to clearly indicate when it was last updated to ensure annual review.

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 CMO partners with the Touro Graduate School of Education to subsidize the costs of initial teaching certificates for uncertified teachers. The education corporation plans to continue its subsidization program for teachers’ master’s degrees and certifications to the extent funding and budgets permit. For most teachers, obtaining and maintaining their teacher certification is a requirement for their continued employment at Zeta Schools NYC. The education corporation’s certification team assists teachers in navigating certification programs and tracking certification statuses.

COMPLIANCE REPORTING

ZETA CHARTER SCHOOL BRONX MOUNT EDEN

Teacher Certification

At the time of the renewal review, Zeta Mount Eden employed 19 lead teachers. Of the 19 lead teachers, five were uncertified, which is within the allowable limit. Of the five uncertified teachers, all met the appropriate qualifications under the Act.

ZETA CHARTER SCHOOL BRONX TREMONT PARK

Teacher Certification

At the time of the renewal review, Zeta Tremont Park employed 23 lead teachers. Of the 23 lead teachers, five were uncertified, which is within the allowable limit. Of the five uncertified teachers, all met the appropriate qualifications under the Act.

COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

To report on parent satisfaction with the schools' programs, the Institute used satisfaction survey data, information gathered from parents representing a cross section of students, and data regarding persistence in enrollment.

Parent Survey Data

The Institute compiled data from the NYCDOE's annual family survey. The NYCDOE conducts an annual survey to gauge satisfaction with schools' programs. The results for each charter under renewal consideration are as follows:

For Zeta Mount Eden, 94% of families responded to the survey with a 97% satisfaction rate.

For Zeta Tremont Park, 90% of families responded to the survey with a 95% satisfaction rate.

Parent Feedback

The Institute asks all schools 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 school for multiple years, parents of students new to the school, parents of students receiving general education services, parents of students with special needs, and parents of English language learners ("ELLs").

During the renewal visit, the Institute met with 15 families from both Zeta Tremont Park and Zeta Mount Eden. Participants described Zeta Schools NYC as providing a whole child educational experience that blends engaging arts programming with challenging curricula in ELA, mathematics, and science. Parents expressed feeling well informed about their child's progress in school while citing that Zeta Schools NYC teachers are easily accessible and highly responsive to student needs. Regarding improvements, parents called for continued expansion of the school programming during the summer months and after school year round. Some parents expressed the need for the schools to ensure they provide translation services during meetings with families where parents primarily speak a language other than English.

Public Comments

In accordance with the Act, the Institute notified the district in which the charter 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 on the Zeta Schools NYC renewal application for Zeta Mount Eden and Zeta Tremont Park on October 22, 2024, via joint videoconference. School officials discussed the schools' mission to ensure that every child in America has access to the highest-quality, free education from pre-Kindergarten – 12th grade. In

COMMUNITY SATISFACTION & ENROLLMENT AND RETENTION

In addition to academics, they shared that the schools offer social-emotional learning, meditation for self-awareness, self-regulation, and self-actualization, along with robust, world-class specialty activities such as Taekwondo, violin, music, chess, dance, soccer, the Zeta Innovation Laboratory, and other enriching activities. Zeta Schools NYC schools are designed to be neighborhood schools that reflect the diversity of the communities they serve. Zeta Schools NYC believes a diverse student population enriches the school environment and elevates everyone's level of learning. Zeta Schools NYC's target population includes students from low- or mixed-income households and students of color, who have historically been under-resourced and educationally disadvantaged. The schools are committed to serving at-risk student populations, ELLs, students with special needs, students experiencing housing insecurity, and students struggling with grade level mastery. Zeta Schools NYC intentionally locates its schools in historically overlooked and under-resourced areas to ensure and fight for equitable access to high quality education. No one spoke in opposition to the application.

Enrollment and Retention

Zeta Schools NYC's schools makes good faith efforts to meet their enrollment and retention targets. Zeta Mount Eden comes close to meeting its enrollment target for economically disadvantaged students but does not meet its enrollment targets for ELLs or students with disabilities. Zeta Tremont Park does not meet its enrollment targets. Although the schools do not meet their retention targets, the subgroup retention rates are commensurate with the schools' overall persistence rates.

Persistence in Enrollment

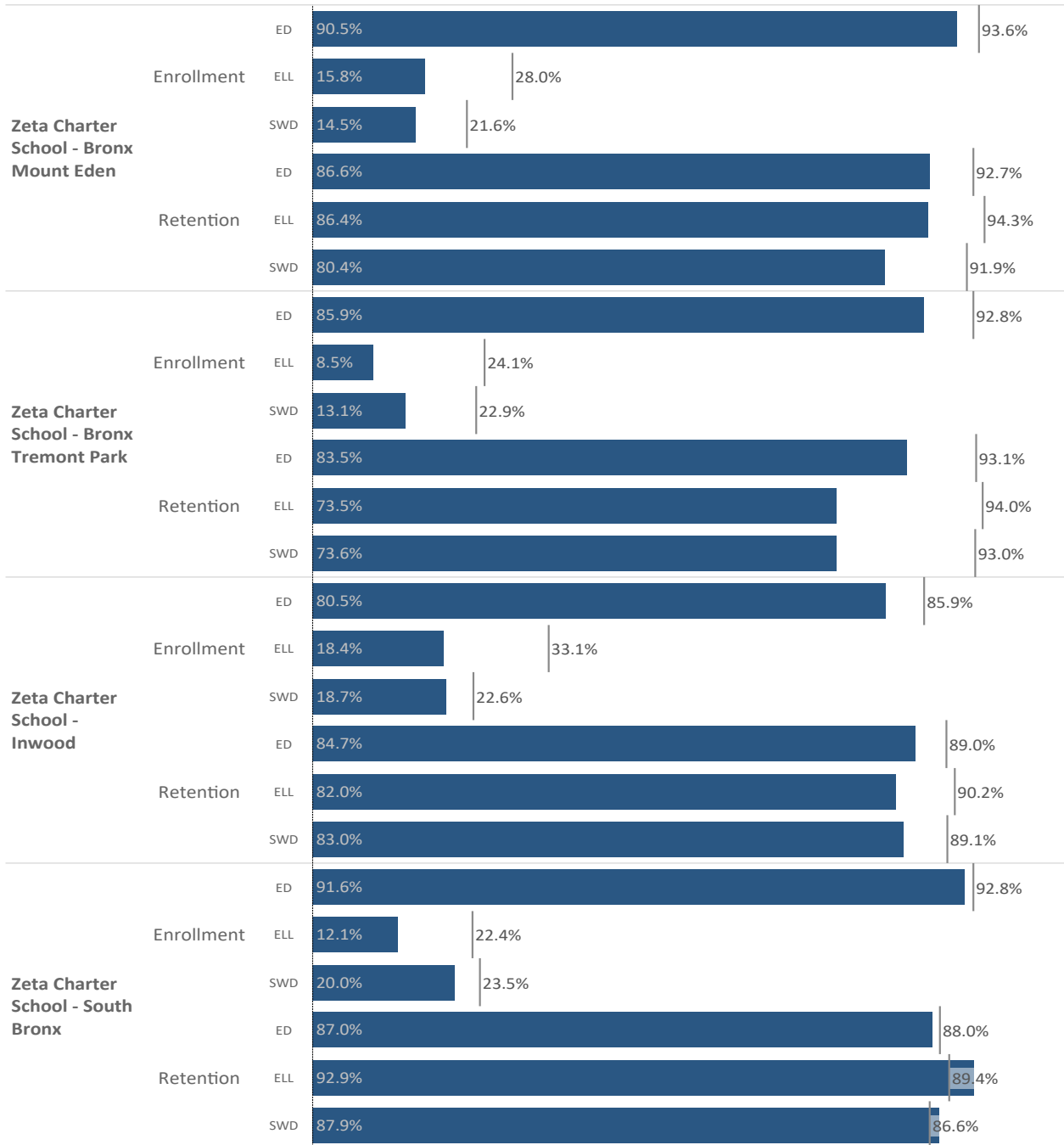
An additional indicator of parent satisfaction is persistence in enrollment. In 2023-24, 87% of Zeta Mount Eden and 83% of Zeta Tremont Park students returned from the previous year. Student persistence data from previous years of the charter term is available in the student demographics section of the report.

The Institute derived the statistical information on persistence in enrollment from its database. No comparative data from the NYCDOE or the 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.

Zeta Charter Schools -
New York City

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APPENDICES

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FISCAL
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ZETA CHARTER SCHOOL - BRONX MOUNT EDEN – SCHOOL CHARACTERISTICS

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT ¹	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2020-21	60	62	104%	K
2021-22	210	179	85%	K-1
2022-23	300	298	99%	K-2
2023-24	510	449	88%	K-3
2024-25	658	574	87%	K-4

ZETA CHARTER SCHOOL - BRONX TREMONT PARK – SCHOOL CHARACTERISTICS

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2020-21	60	58	97%	K
2021-22	210	191	91%	K-1
2022-23	300	339	113%	K-2
2023-24	540	474	88%	K-3
2024-25	718	593	83%	K-4

CHARTER VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2020-21	First Year (virtual) - Zeta Mount Eden First Year (virtual) - Zeta Tremont Park	May 10, 2021
2024-25	Initial Renewal - Zeta Mount Eden Initial Renewal - Zeta Tremont Park	December 9 –10, 2024

CONDUCT OF THE RENEWAL REVIEW

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
December 9 – 10, 2024	Jeff Wasbes Kathleen Haywood	External Consultant School Evaluator

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

Zeta Charter School- Bronx Mount Eden (“Zeta Mount Eden”) and Zeta Charter School- Bronx Tremont Park (“Zeta Tremont Park”) met their academic Accountability Plan goals in their initial charter terms. Both schools first enrolled students in state testing grades during 2023-24 and, therefore, only posted their first set of results suitable for analysis that year. Notably, both schools exceeded the targets for all applicable measures under the mathematics goal.

In English language arts (“ELA”), both Zeta Mount Eden and Zeta Tremont Park met the goal posting high comparative achievement. In 2023-24, 54% of students enrolled in at least their second year at Zeta Mount Eden scored at or above proficient, exceeding the district results by 30 percentage points. With 60% of students enrolled for at least two years scoring at or above proficiency, Zeta Tremont Park outperformed the district by 33 percentage points. Both schools posted comparative effect sizes in ELA far above the target of 0.3 indicating that they performed higher than expected to a large degree compared to demographically similar schools across the state.

In mathematics, both schools posted high absolute and comparative achievement exceeding the targets for all available measures under the goal area. In 2023-24, among students enrolled in at least their second year, 100% of Zeta Tremont Park students scored at or above proficient and 88% of Zeta Mount Eden students did so. This level of performance far exceeded the absolute target of 75% and the district results. In comparison to schools across the state enrolling similar percentages of economically disadvantaged students, both schools performed higher than expected according to the Institute’s comparative effect size analysis.

ASSESSMENT

Zeta Schools NYC implements a rigorous and comprehensive assessment system creating a data rich organization that improves instructional effectiveness and student learning. Zeta Mount Eden and Zeta Tremont Park administer a variety of diagnostic, formative, and summative assessments throughout the school year to determine students’ levels of mastery. Each campus administers internally created interim assessments quarterly in ELA, mathematics, and science. The network creates the interim assessments and aligns the assessments with New York State’s Next Generation Learning Standards. To measure reading growth in Kindergarten – 5th grade, the schools administer the Fountas & Pinnell Benchmark Assessment System (“F&P”) each quarter. Teachers gather data from formative weekly and biweekly curriculum-based assessments in both ELA and mathematics during the intervening time.

Zeta Schools NYC has a valid and reliable process for scoring and analyzing assessments. Following each interim assessment administration, school leaders lead professional development sessions to train teachers in assessment scoring in specific content areas. Teachers access assessment data using the Schoolrunner platform and monitor class, grade, and school progress using the network’s PowerBI dashboards. At Zeta Schools NYC, teachers use assessment results frequently to meet student needs by adjusting whole class instruction and creating small groups to allow for differentiated instruction. Following each interim administration, teachers complete a data analysis reflection to guide instructional decisions and interventions. Teachers and leaders frequently examine lesson plans, student work samples, and assessment results together to diagnose the

source of student misconceptions and adjust instruction accordingly. Teachers and assistant principals use formative assessments like classwork and quick checks for understanding to adjust instruction and correct student misconceptions in the moment and throughout every lesson.

Network leaders analyze trends in data to update and increase rigor of assessments when appropriate. School leaders also use assessment outcomes to evaluate teacher effectiveness. Following each interim assessment administration, school leaders plan and prioritize professional development sessions to analyze data and inform curriculum decisions with teachers.

CURRICULUM

Zeta Schools NYC curricula effectively support teachers with instructional planning. ELA instruction in Kindergarten – 5th grade relies on the Success for All curriculum with Stepping Stones as a phonics supplement. In mathematics, Zeta Schools NYC pulls from a variety of curricular sources such as Context for Learning, Cognitively Guided Instruction, and Open Up Math to build proficiency with mathematics concepts, word problems, and computational fluency. In science, content stems from Amplify and Rock by Rock curricula along with internally generated materials for Z Lab—the network’s innovation lab. Zeta Schools NYC uses Lavinia Insight to Humanities as its humanities curriculum.

Teachers, principals, and network leaders review curricular materials at the beginning of the year during summer professional development. During the summer, teachers engage in unit launches and a review of scripted lesson plans along with scope and sequence documents. Throughout the year, the network provides teachers with detailed instructions on how to analyze and prepare instructional units and lessons. Providing these instructions both sets high expectations for teachers’ preparation routines and ensures they develop the procedural and content knowledge necessary to deliver high quality, effective instruction. Teachers adapt content as needed, and leaders make broader curricular shifts in response to student performance data from the previous school year. For example, to improve student automaticity with mathematics facts, Zeta Schools NYC modified its mathematics curriculum during the 2022-23 school year to allow for more practice exercises. As an additional support, teachers can practice instructional techniques during weekly individual or biweekly small group meetings with assistant principals.

PEDAGOGY

High quality instruction is evident across classrooms at Zeta Schools NYC, and teachers deliver lessons to bolster student engagement in both small and whole group settings. The curricular materials support teachers in delivering purposeful lessons with clear objectives across content areas. Lavinia Group and the Zeta network team provide lesson plans and supporting guidance documents for teachers who then prepare for each lesson by internalizing and reflecting on the lesson’s purpose. Teachers use effective techniques to gauge student understanding including turn and talks, circulating the room, and cold calling. Teachers consistently and thoughtfully address student misconceptions during instruction. All observed teachers demonstrated fluency with upholding clear directions and efficient classroom transitions, and most teachers use effective techniques to keep students engaged in instruction and on task.

In most classrooms, teachers challenge students in a manner that promotes depth of understanding and higher order thinking. Zeta Schools NYC leaders identified a tight data and information cycle as a current pedagogical priority. The Institute observed many teachers closely monitoring student work and using that information to redress student misconceptions. The Institute also observed clear links between data analysis, instructional planning, and lesson delivery at both schools under renewal review.

INSTRUCTIONAL LEADERSHIP

The instructional leadership teams at Zeta Schools NYC implement processes that effectively support each school to produce academic excellence. School and network leaders execute a collaborative professional development system and provide close, clinical coaching to teachers, leveraging structured tools and targeted support to maintain high instructional quality and student outcomes. Instructional leaders, supported by Zeta Schools NYC’s charter management organization (“CMO”) staff and external experts, utilize proven methods and tools, including the Brilliance in Excellence Teaching (“BiEt”) rubric, to evaluate, support, and advance teacher effectiveness.

School leaders create a culture of clear and high expectations for teacher performance. Leaders engage in ongoing professional learning and turnkey it to teachers during weekly data and planning meetings. Leaders review classroom performance data, including student work submissions, pass rates, and trends, to guide feedback for teachers. Assistant principals use this data to identify areas for targeted student support and adjust instructional practices. Teacher evaluations incorporate student performance metrics, ensuring accountability for academic outcomes. Leaders also provide immediate, in-the-moment feedback during classroom visits, tailored to individual teacher needs to foster empowerment rather than intrusion. Assistant principals, assigned to specific grade levels, conduct regular classroom observations and share information across leadership teams to ensure consistency. Leaders supplement observational feedback with one-on-one written summaries for teachers and opportunities for peer observations. Leaders use the BiEt rubric to monitor and enhance instructional practices. The rubric allows leaders to identify trends, evaluate individual teacher performance, and frame professional development conversations. Assistant principals analyze rubric trends to refine their coaching techniques and track progress toward instructional goals.

Zeta Schools NYC provides robust professional development opportunities. Before each school year, staff members participate in a six-week summer program. New teachers receive over 56 hours of specialized training on Zeta Schools NYC’s academic model, instructional strategies, and classroom culture. During the first eight weeks of the academic year, the schools build on the summer training by focusing on active learning, relationship-building, and creating a supportive learning environment. Leaders also receive targeted sessions on instructional and operational best practices, ensuring alignment across the network. The schools also incorporate classroom labsites, where teachers model best practices while others observe and practice implementing the techniques. Recorded sessions allow teachers to reflect on their strengths and areas for improvement. This system encourages continuous professional growth and cross-school collaboration. Additionally, Zeta Schools NYC supports teachers in adopting new curricula, such as a recently introduced mathematics program. Leaders focus on making the curriculum accessible through coaching, modeling lessons, and facilitating high-order thinking strategies. Teachers have opportunities to observe network staff members modeling lessons, ensuring consistent implementation and alignment with standards.

AT RISK

Zeta Schools NYC utilizes clear procedures to identify and meet the needs of at-risk students including students with disabilities, English language learners (“ELLs”) and those struggling academically. Zeta Schools NYC implements a data-driven Response to Intervention (“RTI”) framework and robust supports. The schools employ evidence-based strategies, leverage technology and co-teachers in every classroom, and provide targeted professional development to ensure effective interventions for students with diverse learning needs. Zeta Schools NYC uses interim assessments and teacher observations to identify students requiring additional support. The RTI team, with data gathered by each site’s student achievement manager, develops individualized intervention strategies and monitors their effectiveness. Regular RTI meetings, occurring at least quarterly, ensure progress monitoring and occur as often as biweekly to fast-track necessary adjustments. Instructional leaders and teachers access student performance data through PowerBI and Schoolrunner, which leverage precise, disaggregated analytics to provide insights into student strengths, struggles, and corresponding academic plans. These dashboards allow leaders to view disaggregated data for various student groups including students with disabilities, ELLs, and returning students.

Zeta Schools NYC has effective intervention programs to meet the needs of at-risk students. Zeta Schools NYC implements the integrated co-teaching (“ICT”) model and special education teacher support services (“SETSS”) to meet the needs of students with disabilities. SETSS teachers provide targeted instruction and draft progress reports aligned with individualized education program (“IEP”) goals. General education teachers review IEP goals through quarterly updates and annual reflections. School psychologists develop individualized behavior support plans and perform cognitive and achievement testing for special education evaluations when necessary.

Zeta Schools NYC collaborates closely with local Committees on Special Education (“CSE”) to secure services for students with IEPs. Zeta Schools NYC provides counseling; the district provides other related services. When Zeta Schools NYC experiences delays in district provided services such as occupational therapy and physical therapy or incompletely covered services such as speech language therapy services, Zeta Schools NYC works with the CSE to compensate for missed services or provide additional support in the interim. Students who have missed services attend the afternoon academy or receive mandated services after school. Alternatively, other families utilize related services authorizations (“RSAs”), wherein the district covers the costs for families to engage with independent providers that they select. However, during the 2023-24 school year, Zeta Schools NYC faced challenges hiring SETSS providers at Zeta Mount Eden, relying instead on small group instruction and tutoring.

General education teachers, as well as specialists, employ effective strategies to support students within the general education program. Zeta Schools NYC incorporates Universal Design for Learning (“UDL”) principles to create flexible and inclusive instruction. Curriculum elements, such as interactive read-alouds and guided reading, support ELLs’ language development. Teachers adapt scripted curricula, annotating lesson plans with targeted questions and strategies to ensure accessibility for all learners. For instance, 4th grade teams utilize Google Classroom to provide supplemental resources.

The ELL program at Zeta Schools NYC incorporates English language immersion with differentiated instruction, supported by evidence-based tools such as Success for All for literacy and DreamBox Learning for mathematics. ELLs receive small group instruction, tutoring two days a week, and Lexia English assignments for personalized language acquisition. Assistant principals oversee ELL programming, which lacks dedicated ELL teachers but

ensures collaboration among general education staff and families to support language development. Zeta Schools NYC tracks ELL progress using the New York State English as a Second Language Achievement Test (“NYSESLAT”) and dedicated progress dashboards.

Zeta Schools NYC provides effective professional development to assist teachers in meeting at-risk students’ needs. Professional development focuses on differentiation strategies and intervention implementation, occurring during the schools’ summer session and throughout the academic year. Teachers and at-risk program staff members collaborate during RTI meetings to analyze data and refine strategies. Grade level meetings address instructional challenges, ensuring alignment across classrooms. Leaders maintain open communication with families, logging interactions and actions in Schoolrunner to support potential special education evaluations.

ORGANIZATIONAL CAPACITY

Zeta Schools NYC has established a robust organizational structure and policies that effectively promote high quality instruction and foster a supportive academic environment. The CMO and school leaders collaborate to ensure alignment with the network’s strategic priorities and goals. The CMO, led by its founder and chief executive officer (“CEO”), encompasses multiple teams dedicated to academic and operational excellence. The academic team, headed by the chief academic officer (“CAO”), consists of experienced educators specializing in teaching, curriculum design, and managing high-performing schools. This team works in tandem with the school excellence team, led by the chief schooling officer (“CSO”), to support principals in implementing the network’s school design.

The alignment between the CMO and school leadership supports sustained academic success and operational excellence. CMO and resident operational teams further enhance Zeta Schools NYC’s capacity to support its schools. The CMO operational strategy team ensures sound financial and operational practices, while the operational excellence team focuses on daily school operations. The CMO operational excellence strategy team manages the scaling of operations, and the strategic impact team oversees advocacy and communication strategies. An advisory team oversees legal matters for the CMO and individual schools. This structured approach ensures effective governance and operational sustainability across the network.

Zeta Schools NYC demonstrates organizational effectiveness through its structured leadership, strategic planning, and commitment to teacher development. At the school level, principals oversee assistant principals who focus on teacher coaching, while operations directors manage logistics. School psychologists address student well-being, and student achievement managers oversee academic interventions. This leadership team collaborates with SETSS and ICT teachers to provide services aligned with IEPs and monitor interventions for ELLs. Zeta Schools NYC leaders analyze student and staff performance data annually to establish measurable goals that inform schoolwide priorities. The board of trustees and CSO review these goals, ensuring accountability and alignment with network objectives. Network leaders conduct school walkthroughs and quarterly data reviews to develop tailored professional development plans for school leaders. These plans guide progress monitoring discussions and evaluations, driving continuous improvement in instructional quality and student outcomes.

BOARD OVERSIGHT & GOVERNANCE

Zeta Schools NYC’s board effectively sets clear goals across all functional areas of the education corporation and establishes routines and procedures to monitor each school’s progress toward meeting Accountability Plan goals. Zeta Schools NYC’s board members possess knowledge, experience, and skills that contribute to effective oversight of each school’s progress toward meeting performance goals. The board effectively holds the CMO accountable to delivering high quality design and implementation support to the programs on the ground. The board receives comprehensive reports supported by deep data analyses about all functional areas of school operations and academics. Using its wealth of information, the board sets and monitors progress to goal attainment using valid and aligned metrics spanning all functional areas.

The board’s depth of experience enables it to effectively develop strategic plans to operationalize the schools’ vision for high quality instruction, enriching student experiences in sports and the arts, and progress toward growing the organization to meet future goals of providing middle and high school programming. The board’s rigorous oversight and planning support the education corporation’s high academic performance, fiscal health, and high parent and student satisfaction. In pursuit of the organization’s mission, the board routinely and effectively evaluates its own performance using a clear set of mission aligned metrics across each functional domain within the education corporation.

PRE-KINDERGARTEN PROGRAM REVIEW

New York City charter schools have the opportunity to contract with the New York City Department of Education (“NYCDOE”) to provide a universal pre-Kindergarten (“pre-K”) program. State statute requires the Institute to conduct ongoing monitoring for full day universal pre-K programs at all SUNY authorized charter schools. The Institute conducted its annual visit to the pre-K program in each year of the current charter term. During renewal, the Institute conducted a review of the pre-K program. The NYCDOE and New York City Department of Health and Mental Hygiene (“NYCDOH”) conduct detailed reviews annually focusing on program compliance in regard to the facility, teacher certification, health standards, and finances. The Institute reviews this information as needed. Given the focus from the NYCDOE and NYCDOH, the Institute reviews programmatic elements related to teacher and student interactions, family engagement, and academic program requirements.

REQUIRED PROGRAM INFORMATION

Curriculum:
AppleTree Institute Every Child Ready (“ECR”)

Initial Screener:
ASQ-3

Authentic Assessment:
ECR Tools

Teacher/Student Interaction Evaluation:
CLASS

Environmental Evaluation:
AppleTree Environmental Quality Scale

PROGRAM SUMMARY

Zeta Schools NYC establishes a pre-K program with at least five sections at each of its four open and operating charter schools. Zeta Schools NYC conducts successful outreach to families as each pre-K section is nearly full to the cap of 18 students per classroom. With support from AppleTree Institute, Zeta Schools NYC implements a developmentally appropriate, effective pre-K program that prioritizes literacy and number sense development in pre-K aged students. Each classroom demonstrates print-rich, theme entrenched, warm environments. Teachers focus on infusing rich conversations and other oral development activities throughout the school day.

ACADEMIC SUMMARY

Pre-K programs across Zeta Schools NYC prioritize implementing an effective academic program. Supported by AppleTree Institute’s curricular program, teachers deliver purposeful lessons infusing rich discussion points, language modeling, and exploratory learning for students. Using the curricular themes, students engage in self-selected daily centers work to explore theme based concepts. At the time of the visit, the curricular theme was exploring art, and every classroom clearly aligned its learning and displays to the theme. Zeta Schools NYC teachers implement structured periods of the day that include a balance of student choice and small group instruction. AppleTree Institute provides a curricular program with clear sequences of small group instruction that build students’ foundational literacy and mathematics skills.

FAMILY ENGAGEMENT SUMMARY

Zeta Schools NYC’s pre-K programs engage families through effective strategies. Teachers have multiple communication touchpoints throughout each week to ensure families know what learning takes place in the classroom. At the start of each unit, teachers send home an overview newsletter with tips and strategies for families to engage in and extend learning at home. Each program hosts an end of unit celebration where students present and share what they learned throughout the previous unit. For example, at the end of the construction unit, families joined students for a museum walk where students shared their learning

about construction. The programs also ensure that students are well-prepared for Kindergarten with early communication plans in place. These activities include experiencing a day in the life of Kindergarten for students and participating in class lessons to know what to expect the following year.

ANNUAL AUTHORIZER VISITS - ZETA CHARTER SCHOOL - BRONX MOUNT EDEN

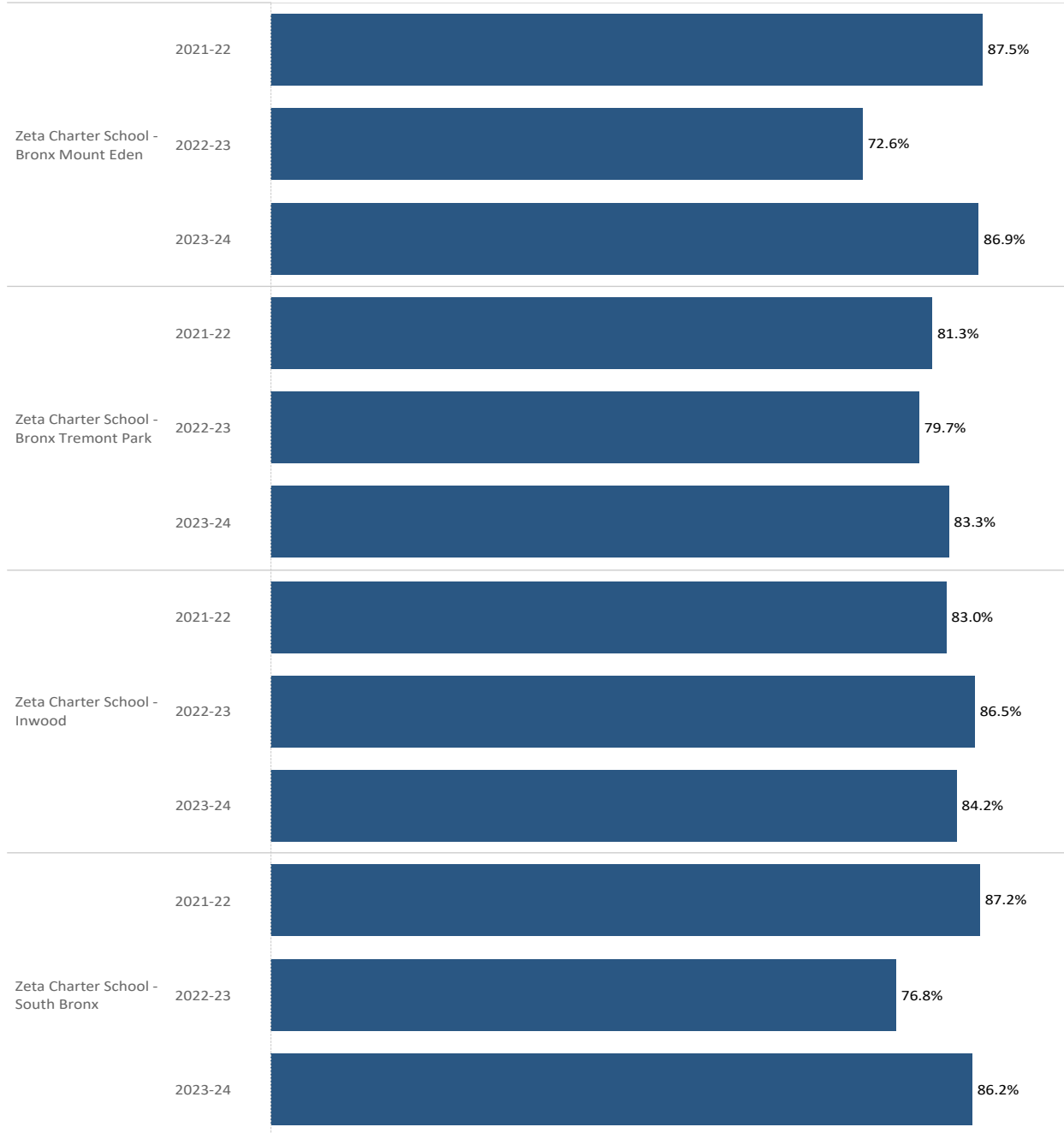
SCHOOL YEAR	DATE
2021-22	March 3, 2022
2022-23	February 16, 2023
2023-24	February 22, 2024
2024-25	December 9, 2024

ANNUAL AUTHORIZER VISITS - ZETA CHARTER SCHOOL - BRONX TREMONT PARK

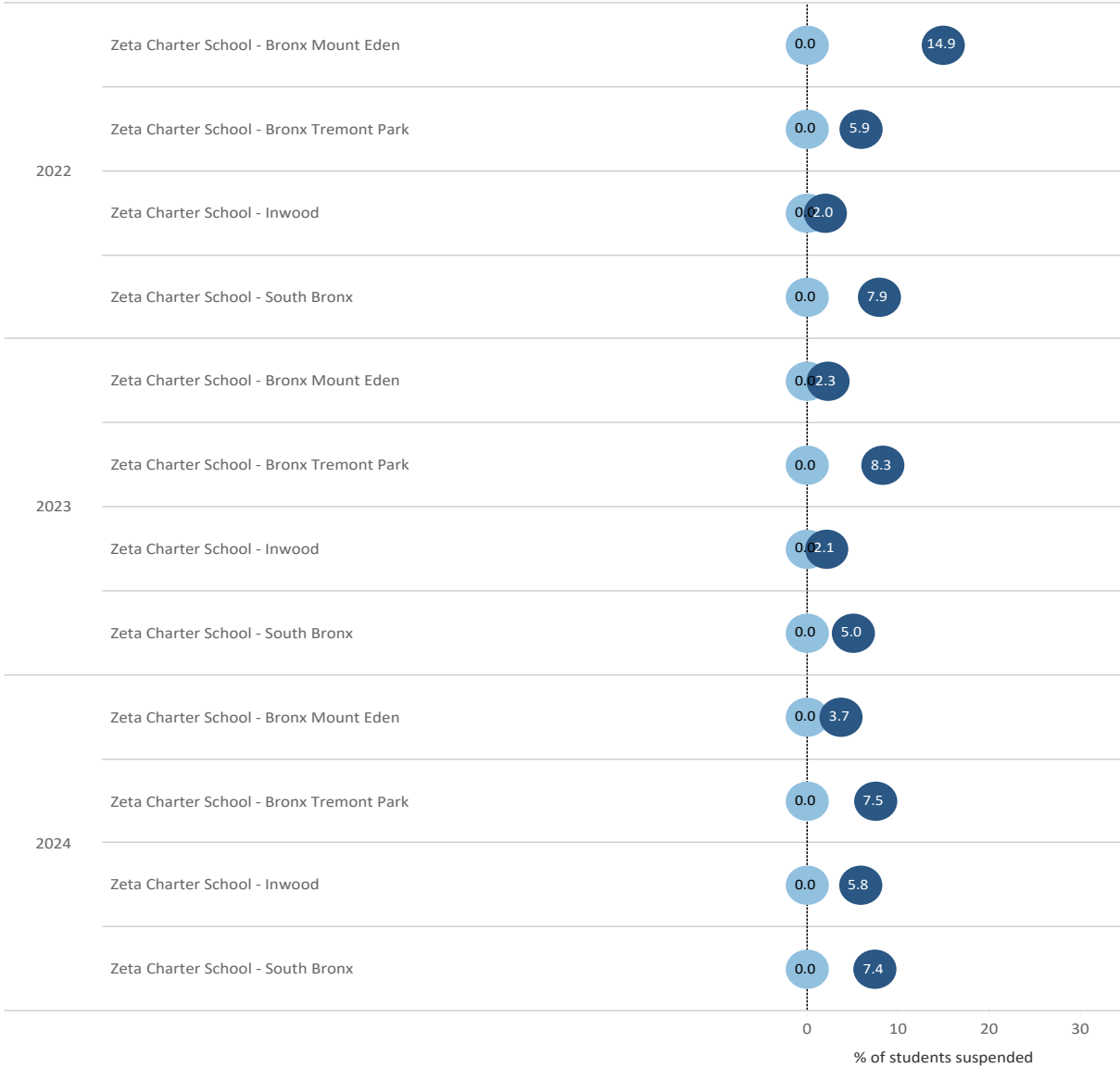
SCHOOL YEAR	DATE
2021-22	March 3, 2022
2022-23	February 16, 2023
2023-24	February 22, 2024
2024-25	December 10, 2024



EDUCATION CORPORATION PERSISTENCE IN ENROLLMENT



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

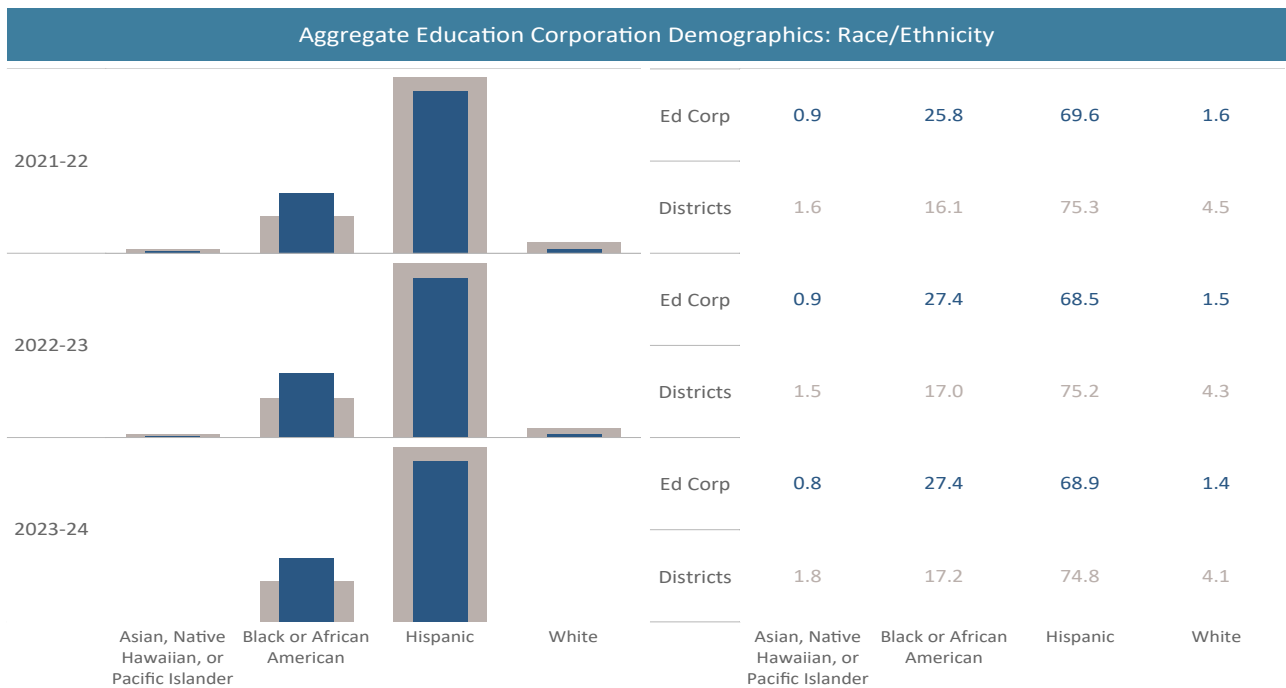
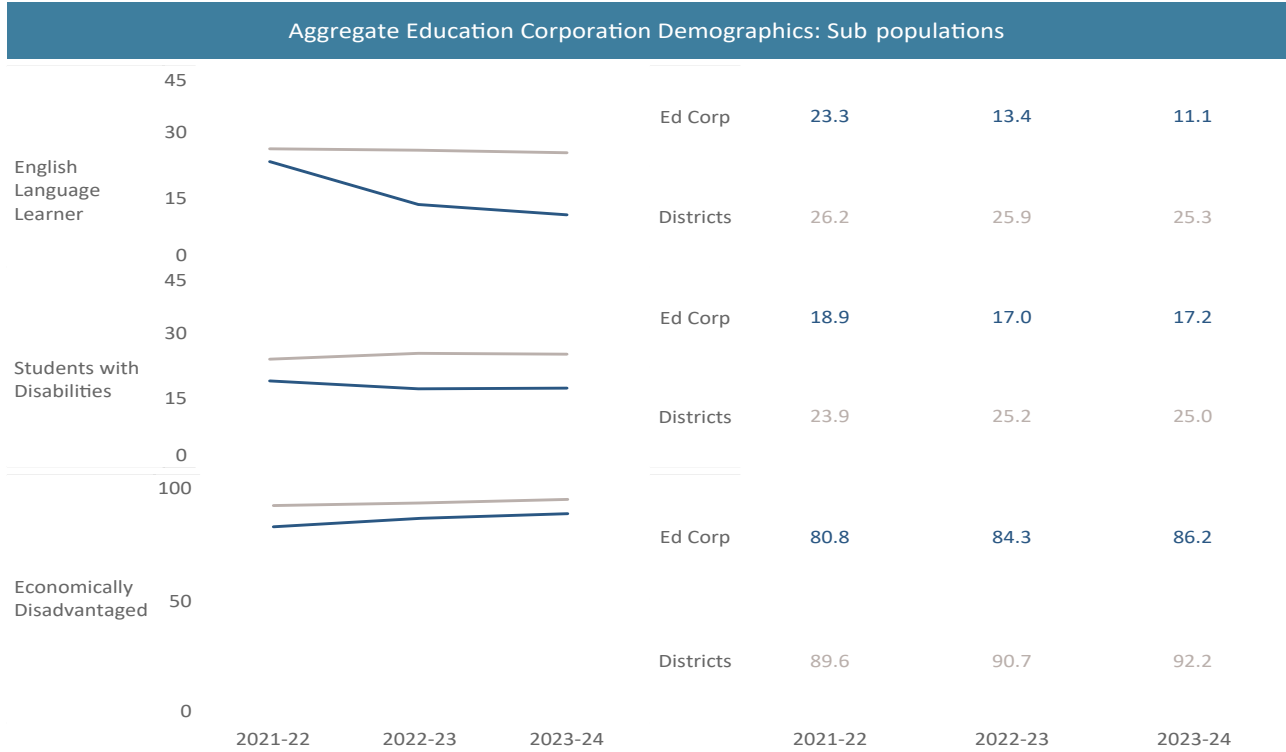


Data suitable for comparison are not available. The percentage rate shown here is calculated using the method employed by the NYCDOE: the total the number of students receiving an out of school suspension at any time during the school year is divided by the total enrollment, then multiplied by 100.

During the most recent school year, the education corporation expelled 0 students.



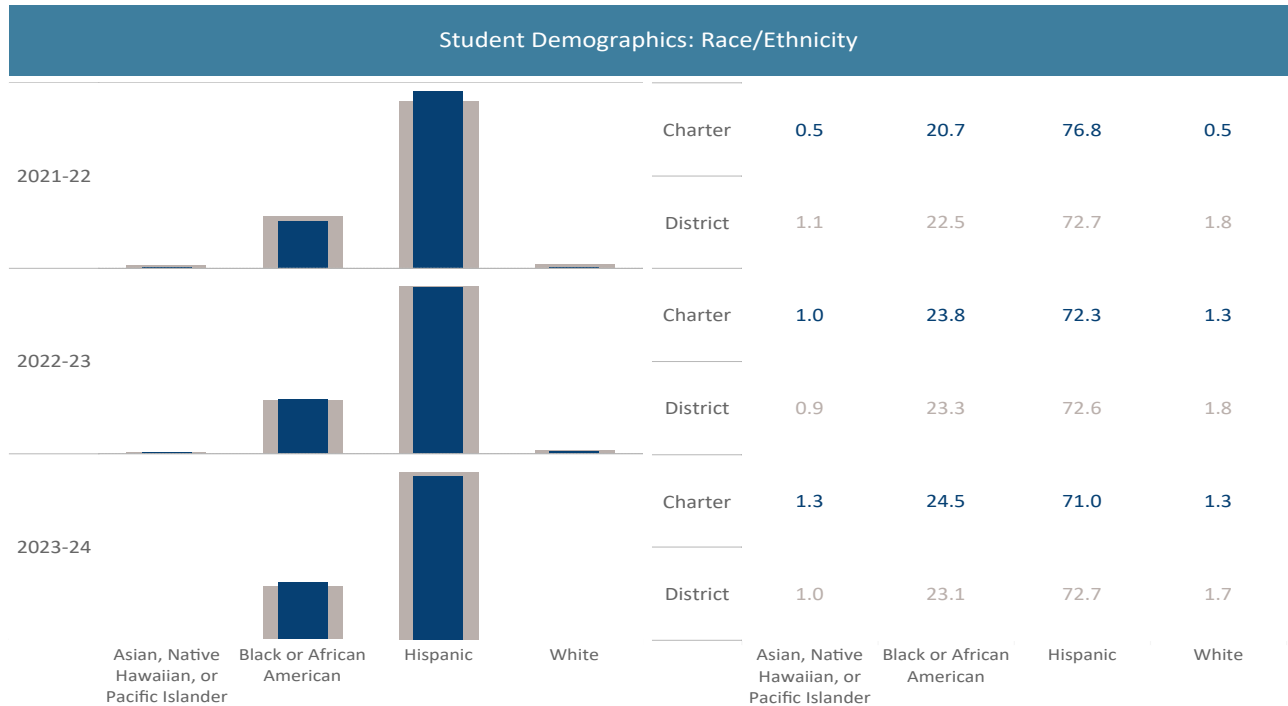
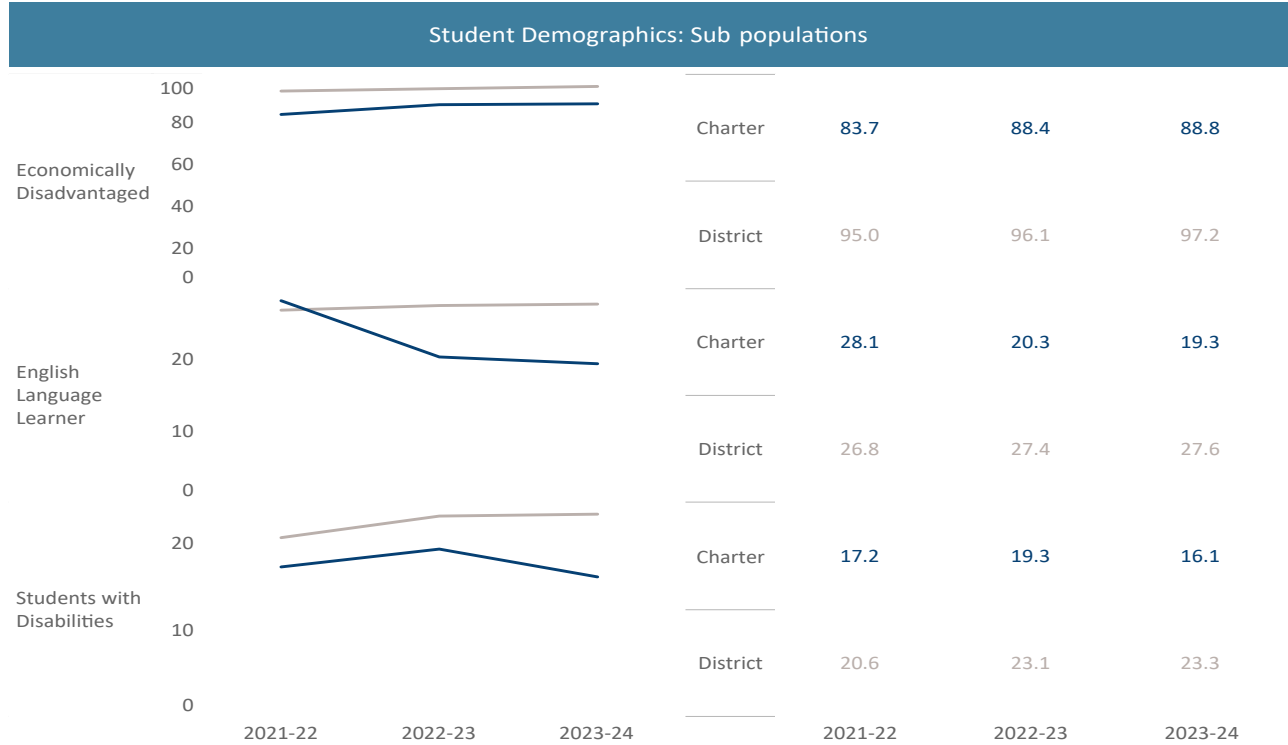
Zeta Charter Schools Aggregate Education Corporation Enrollment





Zeta Charter School - Bronx Mount Eden

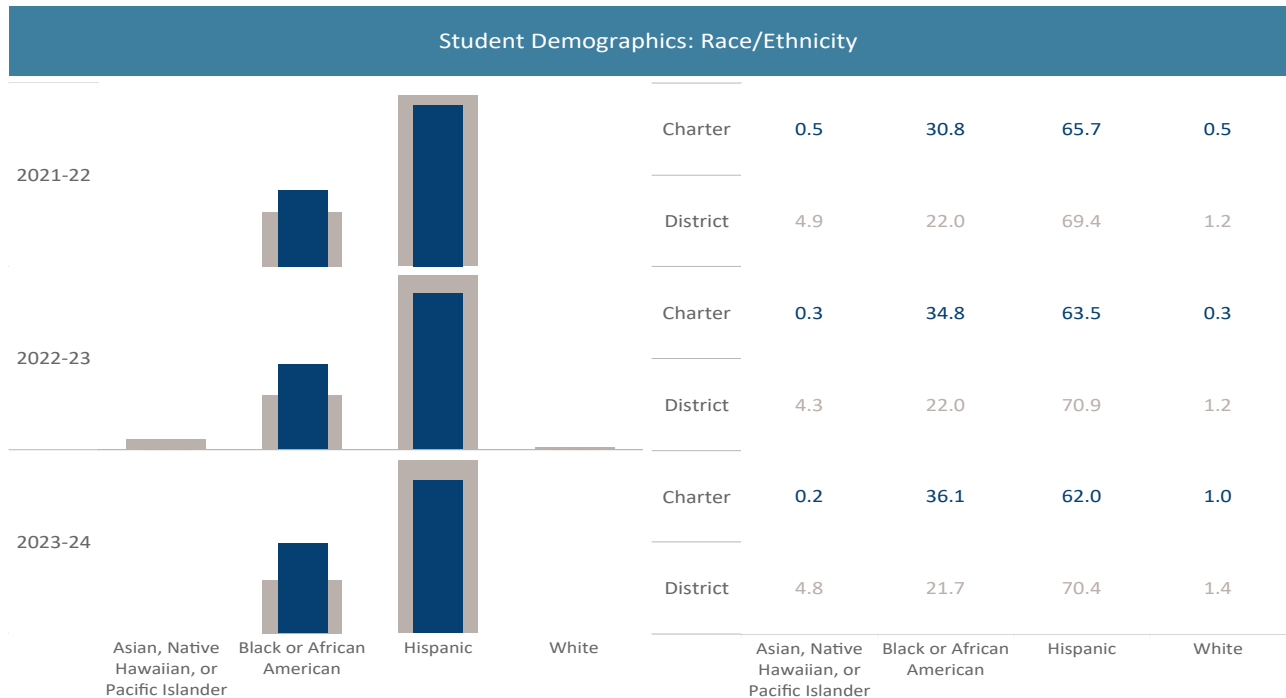
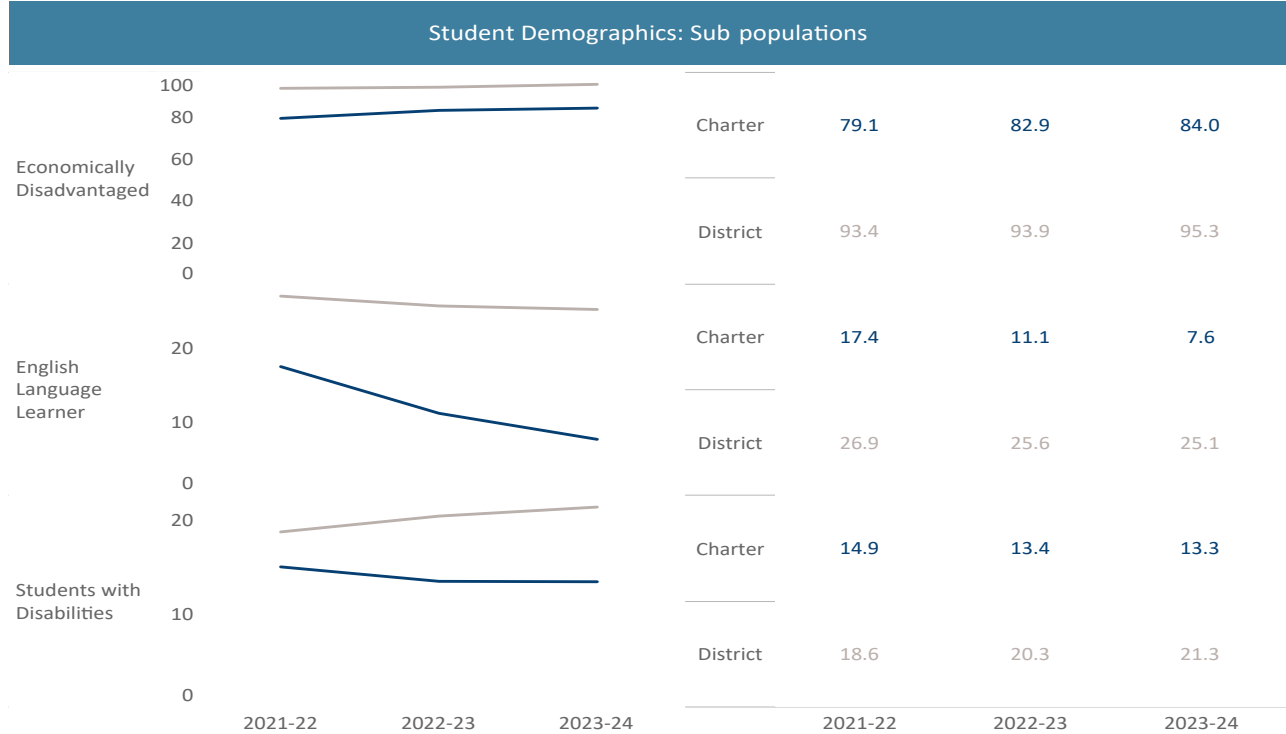
Bronx CSD 9



* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED with the exception of the 2021-22 ELL enrollment which reflects data provided by the education corporation.

Zeta Charter School - Bronx Tremont Park

Bronx CSD 12



* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED with the exception of the 2021-22 ELL enrollment which reflects data provided by the education corporation.

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.	+
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.	DEC 2022

“+” : 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.



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 following reports, which include information about each charter, have 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 for each 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

APPENDIX E: FISCAL BENCHMARKS SUMMARY

INDICATORS	EVIDENT?
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.	+



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