



THE SUNY CHARTER SCHOOLS
INSTITUTE

*RENEWAL RECOMMENDATION REPORT
MERRICK ACADEMY - QUEENS
PUBLIC CHARTER SCHOOL*

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The State University of New York

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INTRODUCTION & REPORT FORMAT

This report is the primary means by which the SUNY Charter Schools Institute (the “Institute”) transmits to the State University of New York Board of Trustees (the “SUNY Trustees”) its findings and recommendations regarding a school’s Application for Charter Renewal, and more broadly, details the merits of a school’s case for renewal. The Institute has created and issued this report pursuant to 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*** (the “SUNY Renewal Policies”).¹

THE INSTITUTE MAKES ALL RENEWAL RECOMMENDATIONS BASED ON

A SCHOOL'S
APPLICATION
FOR CHARTER
RENEWAL

INFORMATION
GATHERED DURING
THE CHARTER TERM

ACADEMIC
PERFORMANCE

FISCAL SOUNDNESS

LEGAL COMPLIANCE

RENEWAL
EVALUATION VISIT



Most importantly, the Institute analyzes the school’s record of academic performance and the extent to which it has met its academic Accountability Plan goals.

1. Revised September 4,
2013 and available at: www.newyorkcharters.org/SUNY-Renewal-Policies/.

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REPORT FORMAT

This renewal recommendation report compiles the evidence below using the ***State University of New York Charter Renewal Benchmarks*** (the “SUNY Renewal Benchmarks”),² which specify in detail what a successful school should be able to demonstrate at the time of the renewal review. The Institute uses the four interconnected renewal questions below for framing benchmark statements to determine if a school has made an adequate case for renewal.



Additional information about the SUNY renewal process and an overview of the requirements for renewal under the New York Charter Schools Act of 1998 (as amended, the “Act”) are available on the Institute’s website at: www.newyorkcharters.org/renewal/.

RENEWAL QUESTIONS

1. IS THE SCHOOL AN ACADEMIC SUCCESS?
2. IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?
3. IS THE SCHOOL FISCALLY SOUND?
4. IF THE SUNY TRUSTEES RENEW THE EDUCATION CORPORATION’S AUTHORITY TO OPERATE THE SCHOOL, ARE ITS PLANS FOR THE SCHOOL REASONABLE, FEASIBLE, AND ACHIEVABLE?

2. Version 5.0, May 2012, available at: www.newyorkcharters.org/SUNY-Renewal-Benchmarks/.

This report contains appendices that provide additional statistical and organizationally related information including a largely statistical school overview, copies of any school district comments on the Application for Charter Renewal, and the SUNY Fiscal Dashboard information for the school. If applicable, the appendices also include additional information about the education corporation and its schools including additional evidence on student achievement of other education corporation schools.



RENEWAL RECOMMENDATION

Full-Term Renewal The Institute recommends that the SUNY Trustees approve the Application for Charter Renewal of Merrick Academy - Queens Public Charter School for a period of five years with authority to provide instruction to students in Kindergarten – 5th grade in such configuration as set forth in its Application for Charter Renewal, with a projected total enrollment of 530 students.



To earn a **Subsequent Full-Term Renewal**, a school must demonstrate that it has met or come close to meeting its academic Accountability Plan goals.³

REQUIRED FINDINGS

In addition to making a recommendation based on a determination of whether the school has met the SUNY Trustees' specific renewal criteria, the Institute makes the following findings required by the Act:

- 1:** the school, as described in the Application for Charter Renewal, meets the requirements of the Act and all other applicable laws, rules and regulations;
- 2:** the education corporation can demonstrate the ability to operate the school in an educationally and fiscally sound manner in the next charter term; and,
- 3:** given the programs it will offer, its structure and its purpose, approving the school to operate for another five years is likely to improve student learning and achievement and materially further the purposes of the Act.⁴

ENROLLMENT AND RETENTION TARGETS

Enrollment and retention targets apply to all operating, SUNY authorized charter schools. Merrick Academy - Queens Public Charter School ("Merrick") received a full-term renewal from the SUNY Trustees in 2015 and was given targets at that time. The Act requires charter schools to make good faith efforts to meet enrollment and retention targets for students with disabilities, English language learners ("ELLs"), and students who are eligible applicants for the federal Free and Reduced Price Lunch ("FRPL") program.

3. SUNY Renewal Policies
(p. 14).

4. See New York Education
Law § 2852(2).

As required by Education Law § 2851(4)(e), a school must include in its renewal application information regarding the efforts it will put in place to meet or exceed SUNY’s enrollment and retention targets. SUNY and the New York State Board of Regents (the “Board of Regents”) approved the methodology for setting targets in October 2012, and the Institute communicated specific targets for each school, where applicable, in July 2013. Since that time, new schools receive targets during their first year of operation and others receive targets at renewal.

Merrick makes good faith efforts to meet its enrollment and retention targets. Merrick exceeds all of its retention targets and exceeds its enrollment targets for students with disabilities. The school does not meet its enrollment targets for students who qualify for FRPL and ELLs. The school recognizes the need to ensure all families submit documentation for free and reduced price lunch, and seeks to enroll more ELLs and students who qualify for FRPL. The school works to meet its enrollment and retention targets in the following ways:

- advertising in multiple outlets such as local news media and newspapers, in English and Spanish;
- providing an online platform to receive electronic applications in numerous languages such as Spanish and French Creole via SchoolMint;
- providing all marketing materials in multiple languages including English, Spanish, and French Creole;
- identifying staff members or parent volunteers who can translate for the diverse population of families in the school’s community;
- holding open houses that help to describe programs for ELLs and students with disabilities;
- utilizing referrals by writing letters to the community explaining the support services for ELLs and students with IEPs;
- providing a 12:1:1 program for students with disabilities;
- utilizing the New York City Collaborative for Inclusive Education to provide professional development for teachers that support the school’s special education program and best practices, to build the robustness of the program in order to retain students; and,
- designing marketing materials that highlight special education services provided to students.

For additional information on the school’s enrollment and retention target progress, see Appendix A.

CONSIDERATION OF SCHOOL DISTRICT COMMENTS

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

As of the date of this report, the Institute has not received district comments in response to the renewal application. A summary of public comments submitted to the Institute appears in Appendix C.

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

BACKGROUND

The SUNY Trustees granted Merrick its original charter on January 21, 2000. The school opened its doors in the fall of 2000 initially serving 125 students in Kindergarten – 2nd grade. The school is authorized to serve 475 students in Kindergarten – 5th grade during the 2019-20 school year. If renewed, the school will continue to serve students in Kindergarten – 5th grade with an increased projected total enrollment of 530 students.

The current charter term expires on June 30, 2020. A subsequent charter term would enable the school to operate through June 30, 2025. The school is located in leased space at 136-25 218th Street, Queens, NY in Community School District (“CSD”) 29.

The mission of Merrick states:



Our mission at Merrick Academy – Queens Public Charter School is to become one the finest public schools in America. Merrick Academy – Queens Public Charter School is built on the philosophy that all children can learn. The school ensures that all students meet or exceed New York State performance standards. The focus of Merrick Academy – Queens Public Charter School is built on the core skills of reading, language, and mathematics. Merrick Academy – Queens Public Charter School is organized to provide and extended day, a high degree of individualized instruction, and an innovative research-based curriculum.

At the time of the school’s last renewal in February 2015, the Institute had placed additional terms in Merrick’s renewal charter to fill board vacancies, maintain an odd number of board members, and maintain academic expertise on the board. In 2016, the Institute placed the school on a corrective plan for violations of some of the additional terms, and to follow through on outside fiscal monitoring, and allow the school to hire an outside educational consultant if it was unable to elect a trustee with academic expertise. At the time of the Institute’s spring 2018 visit, the board had suddenly dismissed the former principal and the relationships among the board, staff, and families were fraught with dissension. Although an interim executive director had been hired, Merrick did not have instructional leaders who could provide teacher evaluations per the guidelines of its collective bargaining agreement.

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The academic program on the ground was lacking in multiple areas and the school had not established an organization with the staff and structures necessary to improve the program. To respond to the urgent need for improvement, the board hired a new chief academic officer (“CAO”) in summer 2018 and a new executive director in January 2019. At the time of the Institute’s spring 2019 visit to the school, the new leaders had established strong communication with the board and families and implemented several changes to the program, particularly in instructional coaching and data analysis. However the school had not yet produced results to demonstrate the effectiveness of the program.

Through the school’s Application for Charter Renewal and the Institute’s renewal visit, Merrick has demonstrated a strong academic program according to the SUNY Renewal Benchmarks. The school’s achievement toward meeting its Accountability Plan goals improved in 2018-19 and the school has sustained the changes in the program that led to that improvement.

EXECUTIVE SUMMARY

Over the charter term, Merrick improved its absolute and comparative achievement, meeting or coming close to meeting its key Accountability Plan goals in 2018-19. The school demonstrates success in the following ways:

- In English language arts (“ELA”), Merrick increased its proficiency rates by 31 percentage points from 2014-15 to 2018-19, surpassing the district performance in the final two years of the Accountability Period.⁵ During those years, the school improved its statewide percentile ranking by 39 points. In 2018-19, the school outperformed 60% of schools across the state. In mathematics, Merrick more than doubled its proficiency rate over the charter term. In 2018-19, the school increased the gap between the school and the district to nine points. Notably, in the final three years of its Accountability Period the school increased its mean growth percentile by 15 points. In the final year of the term, the school improved its statewide rank by 14 percentile points and outperformed over half of schools statewide.
- The school posted strong science results in every year of the term, outperforming the district by at least seven percentage points each year. Notably in 2018-19, with 99% of the school’s students scoring at or above proficiency, 78% of those students achieved Level 4, indicating that they performed above grade level expectations.
- Merrick’s students with disabilities outperformed their district peers in every year of the charter term. In 2018-19, the average math growth percentile for these students was 70.6, over 20 points above the target of 50, indicating that the school significantly grew students’ learning at a greater rate than their peers across the state.
- Merrick also demonstrated strong growth for its lowest performing students in the final year of its charter term. In 2018-19, the school’s students who scored at Level 1 the prior year posted mean growth percentiles of 58 in ELA and 82 in mathematics, far exceeding the target of 50.

5. Because the SUNY Trustees make a renewal decision before student achievement results for the final year of a charter term become available, the Accountability Period ends with the school year prior to the final year of the charter term. For a school in a subsequent charter term, the Accountability Period covers the final year of the previous charter term and ends with the school year prior to the final year of the current charter term. In this renewal report, the Institute uses “charter term” and “Accountability Period” interchangeably.

The quality of Merrick’s academic program and board oversight has improved significantly over the school’s fourth charter term. The leaders establish strong relationships with school staff and parents to gain buy-in for the new curricular program and coaching and instructional practices at the school. The coaching systems currently in place at the school are strong and enable teachers and leaders to use data to drive decision making and reflect upon their practice. The school is also strengthening its operations and data management practices. Merrick’s board has made significant efforts to improve its oversight and now has sound structures in place and positive relationships with the school community and families.

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Based on the Institute's review of the school's performance as posted over the charter term; a review of the Application for Charter Renewal; a review of academic, organizational, governance, and financial documentation; and a renewal visit to the school, the Institute finds that the school meets the required criteria for charter renewal.

The Institute recommends that the SUNY Trustees grant Merrick a Subsequent Full Term Renewal.

NOTEWORTHY

At the time of the Institute's visit, a New York City Council Member had awarded Merrick a \$500,000 discretionary grant to expand its STEM programming. With this funding, students will complete a capstone project in science prior to graduation.

ACADEMIC PERFORMANCE



IS THE SCHOOL AN ACADEMIC SUCCESS?

Merrick is an academic success, as it has met or come close to meeting its key academic Accountability Plan goals. The school leaders develop strong systems for data analysis tied to a rigorous curricular program.

At the beginning of the Accountability Period, the school developed and adopted an Accountability Plan that set academic goals in the key subjects of ELA and mathematics. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. The Institute examines results for five required Accountability Plan measures to determine ELA and mathematics goal attainment. Because the Act requires charters be held “accountable for meeting measurable student achievement results”⁶ and states the educational programs at a charter school must “meet or exceed the student performance standards adopted by the Board of Regents”⁷ for other public schools, SUNY’s required accountability measures rest on performance as measured by statewide assessments. Historically, SUNY’s required measures include measures that present schools’:

ABSOLUTE PERFORMANCE, I.E., WHAT PERCENTAGE OF STUDENTS SCORE AT A CERTAIN PROFICIENCY ON STATE EXAMS?

COMPARATIVE PERFORMANCE, I.E., HOW DID THE SCHOOL DO AS COMPARED TO SCHOOLS IN THE DISTRICT AND SCHOOLS THAT SERVE SIMILAR POPULATIONS OF ECONOMICALLY DISADVANTAGED STUDENTS?

GROWTH PERFORMANCE, I.E., HOW MUCH DID THE SCHOOL GROW STUDENT PERFORMANCE AS COMPARED TO THE GROWTH OF SIMILARLY SITUATED STUDENTS?

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. Merrick did not propose or include any additional measures of success in the Accountability Plan it adopted.

The Institute analyzes every measure included in the school’s Accountability Plan to determine its level of academic success, including the extent to which the school has established and maintained a record of high performance, and established progress toward meeting its academic Accountability Plan goals throughout the charter term. Since 2009, the Institute has examined but consistently de-emphasized the two absolute measures under each goal in elementary and middle schools’ Accountability Plans because of changes to the state’s assessment system. The analysis of elementary and middle school performance continues to focus primarily on the two comparative measures and the growth measure while also

6. Education Law § 2850(2)(f).

7. Education Law § 2854(1)(d).

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considering the two required absolute measures and any additional evidence the school presents using additional measures identified in its Accountability Plan. The Institute identifies the required measures (absolute proficiency, absolute Measure of Interim Progress (“MIP”) attainment,⁸ comparison to local district, comparison to demographically similar schools, student growth, and high school graduation and college going rates, where applicable) in the Performance Summaries appearing in Appendix B.

The Institute analyzes all measures under the school’s ELA and mathematics goals (and high school graduation and college preparation goals for schools enrolling students in high school grades) while emphasizing the school’s comparative performance and growth to determine goal attainment. The Institute calculates a comparative effect size to measure the performance of Merrick relative to all public schools statewide that serve the same grade levels and that enroll similar concentrations of economically disadvantaged students. It is important to note that this measure is a comparison measure and therefore any changes in New York’s assessment system do not compromise its validity or reliability. Further, the school’s performance on the measure is not relative to the test, but relative to the strength of Merrick’s demonstrated student learning compared to other schools’ demonstrated student learning.

The Institute uses the state’s growth percentile analysis as a measure of Merrick’s comparative year-to-year growth in student performance on the state’s ELA and mathematics exams. The measure compares a school’s growth in assessment scores to the growth in assessment scores of the subset of students throughout the state who performed identically on previous years’ assessments. According to this measure, median growth statewide is at the 50th percentile. This means that to signal the school’s ability to grow student achievement at the same rate as schools serving similar students across the state in one year’s time the expected percentile performance is 50. To signal a school is increasing students’ performance above their peers (students statewide who scored previously at the same level), the school must post a percentile performance that exceeds 50.

8. During the 2017-18 school year, the state finalized and approved its Every Student Succeeds Act (“ESSA”) plan. The Institute established correspondent changes to required goals and measures in order to align with the new accountability system. The Institute now requires schools to report a Performance Index (“PI”) with the target of meeting or exceeding the state’s MIP.

The Accountability Plan also includes science and ESSA goals, which replaced the No Child Left Behind Act (“NCLB”) goals. Please note that for schools located in New York City, the Institute uses the CSD as the local school district.

SUNY
RENEWAL
BENCHMARK
1A

HAS THE SCHOOL MET OR COME CLOSE TO MEETING ITS ACADEMIC ACCOUNTABILITY PLAN GOALS?

Merrick improved its academic performance in 2018-19 coming close to meeting its ELA and mathematics goals. Merrick showed significant improvement over the term by establishing a strong instructional leadership team and a data analysis cycle aligned to a rigorous curriculum. Notably, from 2014-15 to 2018-19, the school increased its ELA and mathematics achievement by 31 and 26 points, respectively. Merrick met its science and NCLB/ESSA goals in every year of the term. The school's leaders work to ensure that the improvements in the last two years of the term will continue in future charter terms.

Merrick came close to meeting its ELA goal in the final year of its Accountability Period. From 2014-15 to 2016-17 the school's students enrolled in at least their second year posted proficiency rates below the district. Similarly, the school posted comparative effect sizes below the target of 0.3 in those years performing slightly higher than expected compared to demographically similar schools statewide in 2016-17. In 2014-15 and 2016-17, Merrick posted mean growth percentiles below the target of 50 but in 2015-16 surpassed the target by over six points. In 2017-18, the school came close to meeting its goal when 45% of students enrolled in their second year scored at or above proficiency, outperforming the district by two points. Merrick's achievement on its effect size measure improved and concomitant with this improvement in absolute proficiency the school met its growth target in 2017-18. Merrick's mean growth percentile exceeded the target by over two points. In 2018-19, Merrick again came close to meeting its goal, posting results above the local district and improving its achievement on its effect size measure, but missing its growth target.

Merrick's mathematics record of achievement follows a similar trajectory to that of its ELA achievement throughout the Accountability Period, and comes close to meeting the goal in 2018-19. In 2014-15, the school performed below the district and did not meet its targeted effect size measure performing lower than expected compared to schools with similar proportions of economically disadvantaged students. The school also did not meet its growth target. In 2015-16, the school improved its proficiency by 10 percentage points, outperforming the district by one point. Merrick continued not to meet its effect size measure but exceeded the mean growth percentile target by over five points. The following year, the school's absolute performance declined and fell one percentage point below the district.

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Similar to the first year in its Accountability Period, Merrick did not meet its targeted effect size measure or its growth target. In contrast, Merrick demonstrated stronger mathematics achievement in 2017-18 and 2018-19. In 2017-18, the school improved its absolute performance by six percentage points from the previous year and outperformed the district by one point. Although the school did not meet its effect size measure, Merrick exceeded the mean growth target by six points. In 2018-19, Merrick again improved its achievement. With 50% of its students enrolled in at least their second year scoring at or above proficiency, the school outperformed the district by nine percentage points and improved by 11 percentage points from 2017-18. The school posted an effect size of 0.24, performing slightly higher than expected compared to demographically similar schools. Merrick significantly exceeded the growth target of 50 by over 11 points, indicating that the school grew the learning of its students at a greater rate than their peers across the state.

Merrick exceeded its science goal over the term. The school's 4th grade students enrolled for at least two years posted proficiency rates that exceeded the district performance in all five years of the term and exceeded the absolute target of 75%. Notably, in 2018-19, the school outperformed the district by 18 percentage points.

The school remained in good standing according to the state's NCLB and ESSA accountability systems over the charter term.

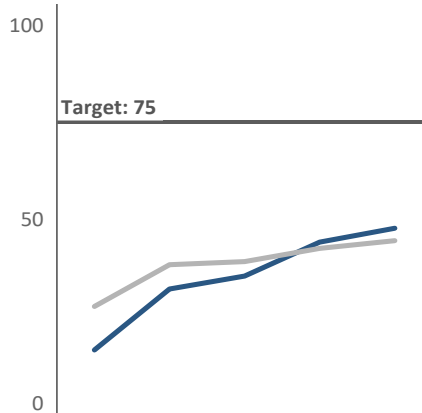
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ACADEMIC PERFORMANCE

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

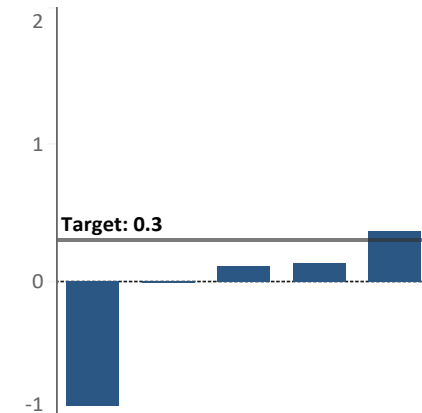
ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

Comparative Measure: District Comparison. Each year, the percentage of students at **the school** in at least their second year performing at or above proficiency in ELA will be greater than that of students in the same tested grades in **the district**.



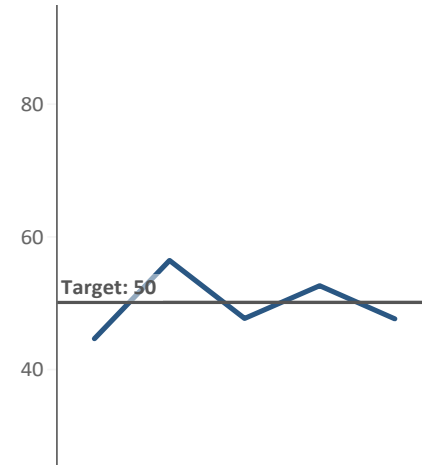
Test Year	Comp Grades	District %	School %
2015	3-6	28	17
2016	3-5	39	33
2017	3-5	40	36
2018	3-5	43	45
2019	3-5	45	48

Comparative Measure: Effect Size. Each year, the school will exceed its predicted level of performance by an effect size of 0.3 or above in **ELA** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.



Test Year	Test Grades	Effect Size
2015	3-6	-0.91
2016	3-5	-0.01
2017	3-5	0.11
2018	3-5	0.13
2019	3-5	0.36

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



Test Year	School Mean Growth
2015	44.8
2016	56.6
2017	47.8
2018	52.8
2019	47.8

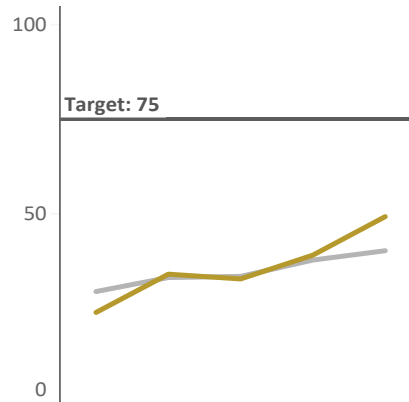
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ACADEMIC PERFORMANCE

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

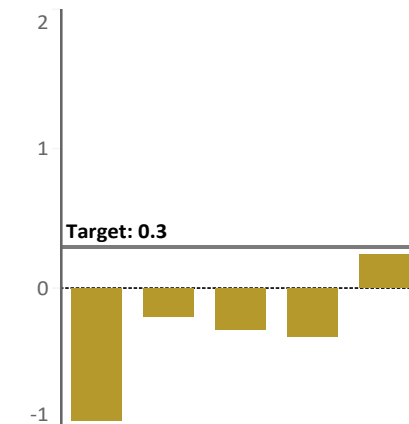
MATHEMATICS ACCOUNTABILITY PLAN GOAL

Comparative Measure: District Comparison. Each year, the percentage of students at **the school** in at least their second year performing at or above proficiency in Mathematics will be greater than that of students in the same tested grades in the district.



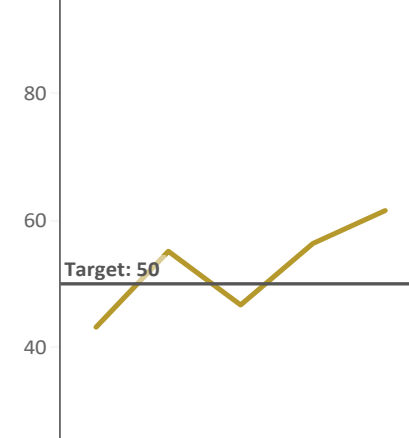
Test Year	Comp Grades	District %	School %
2015	3-6	30	24
2016	3-5	33	34
2017	3-5	34	33
2018	3-5	38	39
2019	3-5	41	50

Comparative Measure: Effect Size. Each year, the school will exceed its predicted level of performance by an effect size of 0.3 or above in **mathematics** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.



Test Year	Test Grades	Effect Size
2015	3-6	-0.95
2016	3-5	-0.20
2017	3-5	-0.30
2018	3-5	-0.34
2019	3-5	0.24

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



Test Year	School Mean Growth
2015	43.3
2016	55.2
2017	46.8
2018	56.4
2019	61.6

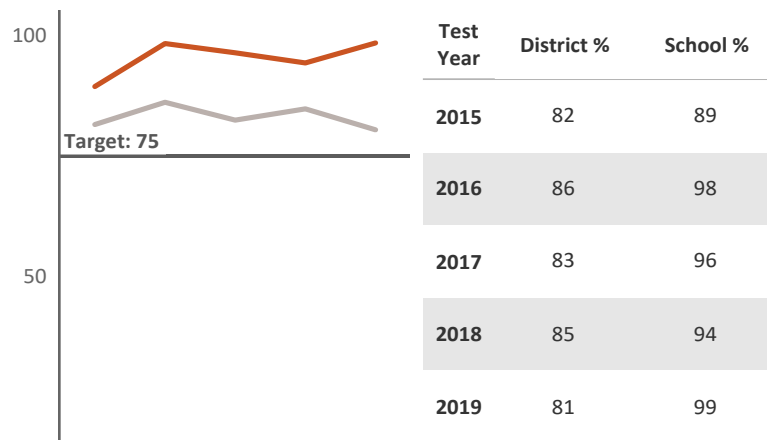
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ACADEMIC PERFORMANCE

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

SCIENCE ACCOUNTABILITY PLAN GOAL

Science: Comparative Measure. Each year, the percentage of students at the school in at least their second year performing at or above proficiency in **science** will exceed that of students in the same tested grades in the **district**.



SPECIAL POPULATIONS PERFORMANCE

	2017	2018	2019
Enrollment Receiving Mandated Academic Services	83	115	107
Tested on State Exam	42	51	51
School Percent Proficient on ELA Exam	16.7	19.6	21.6
District Percent Proficient	10.1	12.4	15.0
	2017	2018	2019
ELL Enrollment	13	17	9
Tested on NYSESLAT Exam	10	13	9
School Percent 'Commanding' or Making Progress on NYSESLAT	20.0	38.5	44.4

The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in the 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."

**SUNY
RENEWAL
BENCHMARK
1B**

DOES THE SCHOOL HAVE AN ASSESSMENT SYSTEM THAT IMPROVES INSTRUCTIONAL EFFECTIVENESS AND STUDENT LEARNING?

Merrick's data analysis practices and assessment system are now effective, a significant improvement since the beginning of the charter term, with formal procedures starting in the 2018-19 school year. This year, assessments are consistently aligned to state standards. Under the direction of the CAO, leaders and coaches use data to drive professional development, instruction, and student learning. Staff members participate in data analysis activities daily to determine student mastery of lessons and content and plan daily to reteach instruction.

- The school regularly administers a variety of assessments aligned to the school's curriculum and state standards. In ELA and mathematics, teachers administer exit tickets, weekly quizzes, and end-of-unit assessments from the Achievement First Navigator ("AF Navigator") curricular materials. For diagnostic and summative purposes, Merrick uses the standards-aligned iReady and Achievement Network ("ANet") assessments three and four times per year respectively. For literacy and phonics progress monitoring, the school uses Dibels and the Fountas and Pinnell Benchmark Assessment System ("F&P") three times per year to determine student reading abilities. Teachers create science assessments aligned to standards and previously released state assessment items.
- Over the charter term the school has improved its systems for scoring and analyzing assessments. Coaches train teachers on the use of AF Navigator and state rubrics for daily, weekly, and unit assessments. Coaches and assistant principals collaborate to grade interim assessments to ensure scores are fair and consistent using normed rubrics.
- Teachers and leaders regularly access student academic performance data. The school created a new data manager position for the 2019-20 school year, who at the time of the Institute's visit was creating a new database and dashboard so that the school can access student achievement data in one centralized location. Currently, teachers access data through multiple shared spreadsheets. The leadership team shares student achievement data regularly with board members.
- Teachers use assessment results to meet student needs using a structured data analysis protocol with oversight from leaders. Coaches and leaders ensure teachers analyze daily exit tickets and sort them into three levels of mastery. Teachers use the data to plan reteach lessons, if necessary, based on student performance. Following interim assessments, teachers work with leaders to create reteach plans to target specific standards that the majority of students did not master at the time of the assessment.

- Leaders use assessment results to plan professional development sessions and compare teacher effectiveness. Leaders study student data and trends from a variety of assessments to identify standards that need more emphasis or students needing more targeted support. Leaders then coach teachers on how to adjust curriculum to either reteach materials or solidify key points throughout their lessons. Leaders turnkey this information during individual and group coaching sessions to teachers to support delivery of instruction.
- The school consistently and effectively communicates student achievement information to families. Teachers communicate regularly about academic growth and progress through individualized communication, such as email, text messages, or electronic communication platforms. The school holds family-teacher conferences three times per year.

SUNY RENEWAL BENCHMARK 1C

DOES THE SCHOOL'S CURRICULUM SUPPORT TEACHERS IN THEIR INSTRUCTIONAL PLANNING?

To address the previous low rigor and lack of alignment of the curricula to state standards, the CAO overhauled the curricular system in the fourth year of the charter term. Merrick now has a curriculum that is aligned to state standards supports teachers in their instructional planning. The instructional leaders provide professional development to support teachers in the internalization and implementation of lessons.

- In 2018-19, Merrick transitioned the school's previous ELA and mathematics curricula to new programs in order to improve student achievement and provide a clear curricular framework for teachers. The school participates in the Achievement First ("AF") Navigator Program and uses the AF open source curricular program based on the design at the high performing Achievement First, Inc. schools, another SUNY authorized charter school, for both ELA and mathematics. These curricula provide a fixed structure to support teachers in their lesson planning and delivery. Teachers create standards-aligned lessons and materials for science instruction.
- The school has supporting tools that provide a bridge between the curricular framework and lesson plans to ensure teachers know what to teach and when to teach it. The school utilizes unit plans, scope and sequences, and curricular maps from the AF curriculum. In the beginning of the school year, teachers submit annotated lesson plans weekly and leadership provides feedback for improvement. The school is in the process of determining the finalized lesson plan review system. Leaders expect teachers to internalize all lessons, prepare for student misconceptions, and annotate any

modifications as necessary. During professional development sessions, coaches also work closely with teachers to understand curricular materials and prepare for lesson delivery through practice sessions. Throughout the year, coaches support teachers to adjust the curriculum in response to student performance. If necessary, teachers have access to standards aligned iReady materials to reteach lessons or create interventions.

- As a stated priority for this year, the leadership team recognizes a need to ensure curriculum is consistently implemented throughout the school and teachers plan purposeful lessons. Coaches give deliberate feedback to teachers around lesson plan internalization, annotation, and execution, but teachers are still in the beginning phases of improving pedagogical practices. Leaders have been intentional about focusing this year's coaching plan on meeting this need.
- Merrick has a process for selecting, developing, and reviewing its curricular resources. When the new CAO started at the school, leaders conducted a review of the curricular program and found that the school did not have structured curricula or consistent expectations for planning. The school decided to adopt the AF curricula. The school reports increased achievement results due to the new curriculum and stronger data analysis practices.

IS HIGH QUALITY INSTRUCTION EVIDENT THROUGHOUT THE SCHOOL?

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Over the charter term, Merrick has improved its instruction and have a clear plan to grow teachers' pedagogical skills. Instructional leaders at Merrick have a clear assessment of areas necessary to improve pedagogy, and have targeted their instructional supports for teachers in alignment with the school's long-term strategic plan. As shown in the chart below, during the renewal visit, Institute team members conducted 26 classroom observations following a defined protocol used in all renewal visits.

NUMBER OF CLASSROOM OBSERVATIONS

		GRADE							Total
		K	1	2	3	4	5	12:1:1	
CONTENT AREA	ELA	1	3	1	1	4	2	1	13
	Math	2	1	2	1	2	1	2	11
	Science				2				2
	Total	3	4	3	4	6	3	3	26

- In alignment with the school's implementation of a strong curricular program, teachers deliver lessons with clear objectives aligned to state standards (21 out of 26 lessons observed). Most lesson objectives are measurable and align to the classroom activities. Teachers explicitly connect material to previous lessons and knowledge. In classrooms with multiple teachers, both teachers have clear roles, with one teacher typically working in small groups with targeted students.
- The majority of teachers regularly use techniques to check for student understanding and adjust instruction accordingly (15 out of 26 lessons observed). Teachers who effectively check for understanding use a variety of strategies including cold calling, turn and talks, hand signals, and exit tickets. Based on student feedback, teachers ask questions to the entire class or rephrase critical instructions. While most teachers circulate the room purposefully to capture student understanding, some teachers do so simply to monitor behavior or activity completion. In some lessons teachers working with a small group of students do not actively monitor the progress and understanding of students doing independent work. Leaders have structured the coaching support to result in implementation of quality checks for understanding, as evidenced by over half of the observed lessons.
- A clear improvement from spring 2019, some Merrick teachers now engage students in higher order thinking and problem solving skills (10 out of 26 lessons observed). In lessons where teachers engage students in higher order thinking, teachers encourage students to elaborate on responses multiple times and justify their thinking. However, in the majority of classrooms observed, teachers do not regularly pose questions that require critical thinking and often provide answers before students have time to grapple with material. Leaders recognize this as an area of growth and plan to continue to use lesson plan feedback at teacher request and coaching to support teachers in utilizing the opportunities available in lessons for higher order thinking.
- Most teachers implement effective behavior management strategies (17 out of 26 lessons observed), but the school has the opportunity to create environments focused more on academic achievement. Teachers use strategies such as positive narration and call and response routines to maintain an orderly and safe environment. In most classrooms, teachers attempt to utilize strong strategies to engage students, and in classrooms where teachers need more support, leaders are working closely with additional professional development opportunities to build and develop teachers' management skills. The school is working to support teachers in leveraging positive classroom environments and adding urgency to pacing to maximize learning time.

SUNY RENEWAL BENCHMARK 1E

DOES THE SCHOOL HAVE STRONG INSTRUCTIONAL LEADERSHIP?

Merrick's instructional leadership has improved significantly over the charter term. After previous leader turnover and weak relationships among leaders, the board, and staff members earlier in the charter term, the current instructional leadership team is aligned in its vision and expectations for teachers, and have engaged teachers in this vision. The leadership team regularly develops itself and teachers and is aligned with the board in priorities for the year.

- Instructional leadership is strong and supports teacher development. This year the instructional leadership team consists of the CAO and two assistant principals. The school leaders intentionally revised hiring criteria to align with student needs, and hired three new instructional coaches to serve on the instructional leadership team. The CAO oversees the assistant principals, who in turn oversee the instructional coaches. All instructional leaders engage in internal and external professional development sessions that improve their capacity as leaders. Although Merrick currently has a vacancy in the new director of student support services ("DSSS") role, the school is actively working to fill this role. One of the assistant principals is currently responsible for oversight of the school's at-risk program, as in previous years.
- Merrick leaders establish high expectations for student achievement and teacher practice. In addition to setting quantitative student achievement goals, leaders set the top priority for this year as improving teacher practice. The CAO has a sound strategic plan for coaching during the year and the leadership team and teachers can articulate expectations for their performance. At the time of the Institute's visit, the school's coaching practices and professional development aligned to this plan.
- Instructional leaders recognize that teachers require significant development in pedagogical skill due to Merrick's history of inconsistent instructional leadership and coaching, and now has quality coaching to address these deficiencies. Instructional coaches observe their caseload of teachers multiple times per week. Coaches meet with teachers weekly and provide them with feedback and action steps, which they record into the school's online classroom observation platform. Coaches may also work with teachers to analyze student work or practice instructional techniques. Merrick's leaders measure the effectiveness of coaching by progress on the Get Better Faster⁹ rubric and regular review of assessment data.

9. For more information see <https://uncommonschoools.org/books/get-better-faster-a-90-day-plan-for-coaching-new-teachers/>.

- In alignment with the leadership team’s priority to improve teacher practice, the summer pre-service training and weekly professional development sessions at the start of the year focus on basic teacher practices aligned with the Get Better Faster rubric. In contrast to previous years, leaders hold teachers accountable for implementing professional development content. The CAO and assistant principals conduct classroom observations then coordinate with the instructional coaches to provide direct feedback to teachers during coaching sessions.
- Merrick teachers effectively collaborate in grade teams. General education, special education, ELL, and intervention teachers meet once per week to plan curriculum, discuss instructional practices, and discuss students of concern. Grade team leaders then follow up with the principal monthly.
- An improvement from inconsistent evaluations during leadership turnover in the middle of the charter term, Merrick leaders now regularly conduct teacher evaluations. With the new CAO starting in 2018-19, the leadership team re-established a system to regularly evaluate teachers’ performance. Now at the beginning of the school year, teachers set goals with their instructional coaches. The CAO and assistant principals then conduct formal performance evaluations at mid-year and end of year using a modified version of the Danielson Framework for Teaching. In contrast to previous years, teachers can now articulate the expectations for teacher performance and evaluation.
- Instructional leaders hold teachers accountable for quality instruction and student achievement, an improvement from previous years in the charter term. At the time of the Institute’s visit, instructional leaders identified that only a few teachers meet the proficiency expectations on the school’s performance evaluation rubric. Instructional coaches provide more intensive coaching to teachers who are struggling and at the time of the visit, the school identified a few teachers who required immediate improvement and were on a performance improvement plan. If a teacher does not improve after additional intensive supports, the school has a clear process to hold teachers accountable.

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DOES THE SCHOOL MEET THE EDUCATIONAL NEEDS OF AT-RISK STUDENTS?

Over the summer before the 2019-20 school year, Merrick increased its capacity to improve and develop its at-risk program quality by adding a DSSS position. In mid-September 2019, the DSSS resigned, and the lower elementary assistant principal took on responsibilities to coach and support the at-risk program staff. Now with the vacancy, the school has not seen the desired growth and improvement in the school's at-risk program, but leaders have a clear plan in place once the school hires a new DSSS.

- In response to state test results, Merrick made changes to the structures of the at-risk program. Leaders added a position in the budget for a DSSS and the school continues to have a dean of special education to ensure all programs are compliant and to work with the district committee on special education ("CSE") to conduct annual reviews of students' Individualized Education Programs ("IEPs"). The school changed the schedule to include an academic intervention services ("AIS") block to allow more time for reteach, remediation, and enrichment. The school also changed the schedule to ensure that at-risk program staff members have the time and ability to join in grade team meetings with no scheduling conflicts. The previous DSSS, who only worked at the school during the summer and first month of school, began conducting a programmatic audit to look at the effectiveness of the programs and student learning. Leaders will ensure this work continues once the school hires a new DSSS.
- Merrick has a clear process for identifying students struggling academically. However, some program elements lack consistency and coherence across the school. During the first month of school, the school utilized state test data and the previous year's interim assessment data to determine tiered interventions. As new students arrive, teachers administer assessments to determine grade level standard mastery, and the student support team reviews this information to identify additional students for intervention services. These procedures result in an effective process for identifying students. However, the interventions did not begin until early October as intervention teachers worked on completing administrative tasks like informing families. Tier 1 is classroom based instruction. Tier 2 includes AIS services with push in and pull out services, and tier 3, the most intensive tier of intervention, includes Title I teachers providing push in or pull out support in individualized or small group settings. The school does not have a consistent program used for interventions with teachers citing many different programs to inform teaching practices. This results in less coherence across the program.

- Merrick’s special education program offers a wide range of services, and students with disabilities’ performance on state exams steadily increased over the charter term. The school offers special education teacher support services (“SETSS”), integrated co-teaching (“ICT”) classrooms, and a 12:1:1 more restrictive setting. The school provides specific training for ICT teachers on different models to support student learning, and the three 12:1:1 classrooms bridge across two grades with a clearly defined program for bridging standards in both ELA and mathematics. The results of the program demonstrate that Merrick’s special education program is improving results for students with disabilities steadily during the charter term. Notably, from 2017-18 to 2018-19, students with disabilities’ mathematics proficiency improved from 15% to 28%, along with high growth scores that exceeded the target of 50 by 4 points in 2017-18 and 21 points in 2018-19.
- Merrick has improved its identification procedures for ELLs and has a new ELL teacher in place to provide consistent supports for the ELL program. During the 2018-19 school year, Merrick reviewed its procedures and provided training to all staff members to better identify ELLs. The school administers a home language survey and now routinely reviews the forms and interviews students whose home language is not English. The school then gives the New York State Identification Test for English Language Learners (“NYSITELL”) to applicable students. The English to Speakers of Other Languages (“ESOL”) certified teacher provides push in and pull out services to ELLs. The ESOL teacher primarily uses the On Our Way to English program with supplemental materials to meet the individual needs of each ELL student. As with other at-risk programs, the school plans to conduct a thorough review of the ELL program services to measure the impact of the current program and make any necessary changes, especially as the school recognizes that results for ELLs decreased from 2017-18 to 2018-19 on both the ELA and mathematics state exams.
- As leaders increase and improve support mechanisms for classroom teachers, general education teachers utilize more strategies for differentiation to meet the needs of at-risk students during lessons. ICT teachers work with general education teachers to provide a wide range of supports during lessons, and the school added an AIS block to provide more targeted small group instruction to students that allow for teachers to target reteaching and remediation.
- Merrick improved its systems to ensure that both leaders and teachers monitor the progress and success of at-risk students. Teachers are well aware of student performance and access student achievement results from multiple sources. The school recognizes a need to streamline these practices. With the hiring of the data specialist, the school plans to introduce a common dashboard to allow teachers to easily and quickly access student achievement data from multiple assessments in one place with sorting mechanisms for student subgroup populations.

- Teachers are aware of student progress toward meeting IEP goals, achieving English language proficiency, and goals for students struggling academically. Merrick creates an at-risk student at-a-glance document for students with disabilities and ELLs so that teachers are well aware of individual goals. The school works closely with the CSE to align IEP goals to state standards. Each at-risk program teacher has a tracking sheet and binder with information for each child to ensure that students make progress toward each student's goal.
- Merrick provides professional development that effectively allows teachers to identify at-risk students and is developing training to ensure that teachers meet at-risk student needs. For identification, the ESOL teacher provided training during summer professional development to ensure teachers have the skills to alert leaders if they suspect students have English language development needs. Other trainings during the summer included strategies for ICT teachers and co-teaching models and an overview of the school's student support team ("SST") and referral processes.
- Merrick improved the coordination between classroom teachers and at-risk program teachers by adjusting the school's schedule and grade team meetings. During the 2017-18 school year, grade team meetings occurred during the same blocks so that providers who serviced multiple grades did not have the opportunity to meet with grade teams. For 2019-20, the school adjusted grade team meetings, so meetings no longer overlap, and at-risk program providers now can join as full team members for the grades to which they provide services. The at-risk program team uses some grade team meetings as needed to discuss specific students through the SST process.

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ORGANIZATIONAL PERFORMANCE



IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

Merrick is an effective and viable organization that has in place the key design elements identified in its renewal application. The organizational structure has clear lines of accountability and supports the academic program. The education corporation board makes efforts to improve its oversight of Merrick.

IS THE SCHOOL FAITHFUL TO ITS MISSION AND DOES IT IMPLEMENT THE KEY DESIGN ELEMENTS INCLUDED IN ITS CHARTER?

Merrick is faithful to its mission and key design elements. These can be found in the School Background section at the beginning of the report and Appendix A, respectively. Merrick implements a rigorous, research-based curriculum and uses data to drive instruction. The instructional leadership establishes comprehensive professional development and schoolwide systems aligned to the school's long-term strategic plan.

ARE PARENTS/GUARDIANS AND STUDENTS SATISFIED WITH THE SCHOOL?

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

Parent Survey Data. The Institute compiled data from the New York City Department of Education's ("NYCDOE's") 2018-19 NYC School Survey. NYCDOE distributes the survey every year to compile data about school culture, instruction and systems for improvement. For 2018-19, 74% of families who received the survey responded. The majority of survey responses (94%) indicate high satisfaction with the school, and the response rate is sufficient to frame the result as representative of the school community.

Parent Focus Group. 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 ELLs. The 12 parents in attendance at the focus group indicated satisfaction with

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the overall school program that Merrick provides students, a marked improvement from parents' comments on their overall satisfaction with the program during the Institute's spring 2019 visit. Parents and families appreciate the improvement in communication under the school's new leadership, as well as emphasis on academics and homework.

Persistence in Enrollment. An additional indicator of parent satisfaction is persistence in enrollment. In 2018-19, 97% of Merrick students returned from the previous year. Student persistence data from previous years of the charter term is available in Appendix A.

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

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DOES THE SCHOOL'S ORGANIZATION WORK EFFECTIVELY TO DELIVER THE EDUCATIONAL PROGRAM?

Merrick has systems to sustain the effective delivery of the educational program. After facing a variety of organizational challenges in 2017-18 including the departure of the school's director of operations, Merrick dramatically improved its organizational structure at the end of the charter term. The board and leadership team filled key staff vacancies and implemented a clear strategy to build organizational capacity.

- After struggling to establish a clear administrative structure in 2017-18, Merrick established systems, filled critical vacancies, added staff, and clarified job responsibilities in the final two years of the charter term. Since joining the school midway through the 2018-19 school year, the executive director added several key positions including a data specialist to help support the academic and operational programs. The school's operations manager oversees all operational functions and continuously tracks project completion. As a result, teachers are able to clearly articulate who to go to for what. Although the role of DSSS became vacant in early 2019-20, the school's increased number of staff and tightened structure allows the assistant principal to temporarily cover those responsibilities.
- The school has a discipline system that affords teachers significant autonomy with clear supports. Teachers implement some clear schoolwide routines and track student behavior with a variety of tools such as ClassDojo. During summer professional development, the school provides various teaching scenarios to walk teachers through suggested strategies. If student behavior is particularly challenging, teachers know to

contact the school's deans or guidance counselors for additional support. While teachers implement behavior management practices at the school level, the school inconsistently implements them across all classrooms.

- Merrick works to retain high quality teachers. The school's current leaders have increased the variety of retention efforts in the final years of the charter term, building substantial teacher buy-in to various coaching and development efforts. In 2019-20, leaders modified teacher schedules to include two dedicated weekly periods for grade team meetings and collaborative planning. Grade team chairs continue to function as teacher leaders that attend special professional development sessions and turnkey information to others.
- Merrick has high student retention and maintains student enrollment to meet the needs of the school's budget. For the last three years Merrick has retained over 96% of its students from year to year. The school has been above its chartered enrollment for all of the charter term. During 2018-19, the school briefly faced a drop in enrollment due to a staffing vacancy and absence of effective systems to monitor and track enrollment. The school responded by establishing clear priorities in 2019-20 for monitoring enrollment including rigorously monitoring student no shows, early absences, and reasons for student attrition.
- In tandem with the school's improved systems for tracking enrollment, in 2019-20, Merrick established clear procedures for monitoring its progress toward meeting enrollment and retention targets for students with disabilities, ELLs, and economically disadvantaged students. The operations manager oversees the school's recruitment efforts for at-risk subgroups, which include canvassing specific neighborhoods with high concentrations of low income families and families who speak languages other than English. Leaders acknowledge that the school has consistently struggled to meet its enrollment target for economically disadvantaged students and as such they have increased its efforts to capture the demographics of its students accurately and are considering an enrollment preference for low income students.
- Instructional leaders are reflective about the school's program and implement necessary changes to sustain the school's improved academic achievement. In order to rectify operational dysfunction due to vacancies and move forward with the school's ambitious strategic plan, the school added a number of positions in operations. As the staff capacity grows, leaders acknowledge that the staffing structure could change. The school's recently hired data specialist works closely with the executive director to develop dashboards to monitor achievement, enrollment, and staffing trends. As a result, the school has valid and accessible data to make strategic decisions. The leadership team and board use these dashboards to review trends across the school and tweak aspects of the strategic plan.

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DOES THE BOARD WORK EFFECTIVELY TO ACHIEVE THE SCHOOL'S ACCOUNTABILITY PLAN GOALS?

After recognizing it failed to provide effective oversight in the first half of the charter term, Merrick's board has improved in its oversight practices. The board now engages in regular professional development and has a strong relationship and communication with the two school leaders.

- Merrick's board members have developed their skills to govern the school effectively. The seven board members have experience in education, law, human resources, and finance. Last year, the board created a committee structure and now conducts business through the executive, academic, operations, HR, and finance committees. The board is not seeking additional members but has structures in place to recruit when necessary, and recognizes a need to consider succession planning for board leadership.
- Board members now regularly evaluate each other's performance. After each board meeting, trustees complete a written evaluation of the effectiveness of the meeting and adjust their practices accordingly. The board also completes a yearly self-evaluation of its performance.
- The board aligns with the school leaders in their focus on significant improvement in student achievement for this school year, which is aligned to a longer term strategic plan. The board's data reports enable oversight of the school's student achievement targets associated with each priority area in the academic improvement plan. The board's reports also includes information about student enrollment, finances, and operations.
- Merrick's board requests and receives information to provide effective oversight of the school. To develop its capacity the board hired external consultants last year to engage in board retreats several times per year. Board members and the school leaders note that board members have a better understanding of the data that leaders present and ask more effective questions that hold leaders accountable. In alignment with the school's burgeoning focus on equity, the board monitors assessment and other data for multiple subgroups of students.
- The board has successfully retained the current school leader after terminating the principal in February 2018 and changing the organizational structure. The board hired the current executive director in January 2019. The board is now responsible for hiring the executive director and provides oversight for hiring school staff. Merrick's board monitors teacher vacancy and hiring information in its data reports to help ensure new staff align with the school's mission.

- The board has conducted a performance evaluation for the leader this year and intends to do so each year. After not consistently evaluating the school leader during the charter term, the board now has an updated performance evaluation tool. The evaluation tool includes accountability for student achievement data.
- The board has increased its communication with the school community. One member of the board is a parent representative and is the parent of both a current and former Merrick student. Two board members have also attended trainings with the CAO and assistant principal.

DOES THE BOARD IMPLEMENT, MAINTAIN, AND ABIDE BY APPROPRIATE POLICIES, SYSTEMS, AND PROCESSES?

The board materially and substantially implements, maintains, and abides by appropriate policies, systems, and processes to ensure the effective governance and oversight of the school.

- The board demonstrates an understanding of its role in holding the leadership accountable for both academic results and fiscal soundness.
- The board materially complies with the terms of its by-laws, code of ethics, and conflicts of interest policy although each need some minor revision. The Institute will work with the school to ensure these are updated before the start of the next charter term.
- The board materially complied with the conditions of its prior renewal regarding having an odd number of trustees, academic expertise on the board, and filling board vacancies in a timely manner.
- Continuing from the last year of the prior charter term, the trustees have made a concerted effort to work together as a board in the interest of the school rather than being divided.
- The board has engaged a board training and governance assistance vendor to aid in board development, organize board materials, such as a board book, and assist in strategic planning.
- An annual board retreat enables trustees to be thoughtful about its role and strategic planning.
- As the current collective bargaining agreement between the school and its union expires in August of 2020, the board has been discussing with leadership bargaining issues and priorities, and reviewing school finances.

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

With the exceptions noted below, the education corporation substantially complies with applicable laws, rules and regulations, and provisions of its charter.

- **Complaints.** The Institute received no formal complaints regarding the school.
- **Compliance.** The Institute issued no violation letters during the charter term.
- **FOIL.** The school does not have the appropriate Freedom of Information Law (“FOIL”) information posted on its website including a link to the Committee on Open Government.
- **Governance Documents.** At the time of the renewal visit, the by-laws, code of ethics, and conflict of interest policy did not all align with respect to certain items such as related party transactions and gifts. The Institute will work with the board’s counsel to align the documents.
- **SAVE Plan.** The school does not have the appropriate public Safe Schools Against Violence in Education (“SAVE”) plan posted on its website.
- **Teacher Certification.** The school employed the limit of uncertified teachers permitted under the Act. However, two uncertified teachers did not have the three years of teaching experience required by the Act but will qualify by the end of the current school year.

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FISCAL PERFORMANCE



10. 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 green – gray – red. 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.

IS THE EDUCATION CORPORATION FISCALLY SOUND?

Based on review of the fiscal evidence collected through the renewal review, Merrick is fiscally sound. The SUNY Fiscal Dashboard presents color-coded tables and charts indicating that the education corporation has demonstrated fiscal soundness over the majority of the charter term.¹⁰

Merrick's financial condition has improved significantly since the last renewal. During the previous charter term, Merrick had less than one day of cash on hand, few net assets, and a string of years with large operating deficits. Financial issues were mostly caused by facility issues documented in the prior renewal report. Since the last renewal, Merrick has operated with financial strength and been able to make additional investments in its academic program. Merrick still holds no long term debt and its fiscal dashboard reflects adequate financial results.

Merrick was recently awarded but has not yet received the funding for a \$500,000 discretionary grant to be used to transform 14 of the school's classrooms into STEM learning environments and further enhance the school facility. The grant award was sponsored by New York City Councilman Donovan Richards through the New York City Mayor's Office of Management and Budget.

Merrick Academy maintains a collective bargaining agreement with the United Federation of Teachers that expires August 15, 2020. The board has been actively involved in preparing for those negotiations including receiving relevant fiscal information.

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

Merrick has the necessary financial resources to ensure stable operations. Merrick has employed clear budgetary objectives and budget preparation procedures throughout the charter term.

- The budget process applies the financial expertise of key board members, as well as experience learned over many budget cycles, to a bottoms-up analysis and approach to determine the required resources for achieving the educational goals and outcomes.

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- The school's budgets are developed annually based on input from an external financial service provider and school administration with a review of the school's financial historical costs and forward looking projections. A draft budget is considered and reviewed by the finance committee and presented to the full board for a vote prior to the beginning of the next fiscal year.
- The projected five year renewal budget conservatively projects 1.0-3.0% increases per year to per pupil revenue.
- Merrick currently serves Kindergarten – 5th grade in a privately leased facility. This facility provides the necessary space for the school's current and anticipated needs in the next charter term. Merrick plans to serve 530 students in Kindergarten – 5th grade in the next charter term.

DOES THE SCHOOL MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

Merrick has a history of sound fiscal policies, procedures, and practices and maintains appropriate internal controls.

- The Fiscal Policies and Procedures Manual serves as the guide to all financial internal controls and procedures. The manual undergoes ongoing reviews and updates. The latest update is dated February 2019.
- The most recent Merrick audit report for June 30, 2019 stated that there was a deficiency in internal controls regarding the segregation of duties for review of the journal entry process. The auditor found the current staff size does not always allow for proper segregation of duties related to recording and reviewing journal entries in the general ledger.
- Since the audit, new procedures have been put in place and a formal review of all journal entries is now being completed by the executive director.

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DOES THE SCHOOL COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

Merrick complies with financial reporting requirements.

- The Institute and NYSED have received the required financial reports on time, complete, and following generally accepted accounting principles (GAAP).
- Independent audits of annual financial statements have received unqualified opinions with no material advisory or management letter findings to report.
- The school has generally filed key reports in a timely and accurate manner including: audit reports, budgets, unaudited quarterly reports of revenue, expenses, and enrollment.
- The June 30, 2019 annual audit was received by the Institute by the due date of November 1, 2019 and reported continued fiscal strength.
- The school invested significant resources into the academic program over the last two years.

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DOES THE SCHOOL MAINTAIN ADEQUATE FINANCIAL RESOURCES TO ENSURE STABLE OPERATIONS?

Merrick has maintained the necessary financial resources to ensure stable operations.

- Since the school opened in 2000-01, the education corporation has reported operating surpluses as well as deficits which were offset against the surpluses. The school has reported operating surpluses in three out of the last four years.
- Merrick's fiscal dashboard in Appendix D reflects fiscally strong practices with one month of cash on hand to pay liabilities coming due shortly.
- Merrick had total net assets of approximately \$1.1 million as of June 30, 2019.
- As a requirement of charter agreements, Merrick has established the separate dissolution reserve fund account of \$75,000.

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FUTURE PLANS



IF THE SUNY TRUSTEES RENEW THE EDUCATION CORPORATION'S AUTHORITY TO OPERATE THE SCHOOL, ARE ITS PLANS FOR THE SCHOOL REASONABLE, FEASIBLE, AND ACHIEVABLE?

Merrick's plans for a future charter term, if renewed, are reasonable, feasible, and achievable. The school plans to serve the same grades in the next charter term while continuing to strengthen both the academic program and the board's governance capabilities.

Plans for the School's Structure. The education corporation has provided all of the key structural elements for a charter renewal and those elements are reasonable, feasible, and achievable.

Plans for the Educational Program. Merrick plans to continue the improvements it began during the current charter term to strengthen teachers' pedagogical skills and the overall academic program in any future charter term. Leaders plan to continue to work closely with teachers to provide effective coaching and observation feedback and expand its STEM programming with the \$500,000 grant it received from a New York City Council member. The school leaders and board recognize the urgency needed to continue improving the program to enable the school to meet its academic goals in the next charter term.

Plans for Board Oversight & Governance. Board members express interest in continuing to serve Merrick in the next charter term, if renewed. The board is considering its training plan to prepare new board members and current members for future leadership of the board. The board plans to continue to engage with external consultants to build its oversight practices.

Fiscal & Facility Plans. Based on evidence collected through the renewal review, including a review of the five year financial plan, Merrick presents a reasonable and appropriate fiscal plan for the next charter term including school budgets that are feasible and achievable.

	CURRENT	END OF NEXT CHARTER TERM
Enrollment	475	530
Grade Span	K-5	K-5
Teaching Staff	42	41
Days of Instruction	180	180

SUNY Charter Schools Institute
SUNY Plaza
353 Broadway
Albany, NY 12246

Merrick plans to continue operations in its current facilities throughout the next charter term, if renewed.

The school's Application for Charter Renewal contains all necessary elements as required by the Act. The proposed school calendar allots an appropriate amount of instructional time to meet or exceed instructional time requirements, and taken together with other academic and key design elements, should be sufficient to allow the school to meet its proposed Accountability Plan goals.

Merrick

Ax

APPENDICES

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FISCAL DASHBOARD

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APPENDIX A: School Overview

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL BOARD OF TRUSTEES

CHAIR

Gerald Karikari

VICE CHAIR

Cameil Dalgetty-Jarvis

TREASURER

Tameka Pierre-Louis

SECRETARY

Tatum T. Boothe

TRUSTEES

James Ding

Joann Cummings

Maria Munoz

SCHOOL LEADERS

PRINCIPAL

Dr. Adrian Manuel, Executive Director (January 2019 to Present)

Aubrey Featherstone, Executive Director (October 2017 to December 2018)

EXECUTIVE DIRECTOR

Samantha Pugh, Chief Academic Officer (July 2018 to Present)

Karen Valbrun, Principal (2014-15 to March 2018)

Nicole Griffin, Interim Acting Principal (2013-14)

Raquel Pottinger-Bird, Principal/Director of Curriculum and Instruction (January 2012 to July 2013)

Roberta Cummings-Smith, Director of Strategic Planning and Staff Development (January 2011 to December 2011)

SCHOOL CHARACTERISTICS

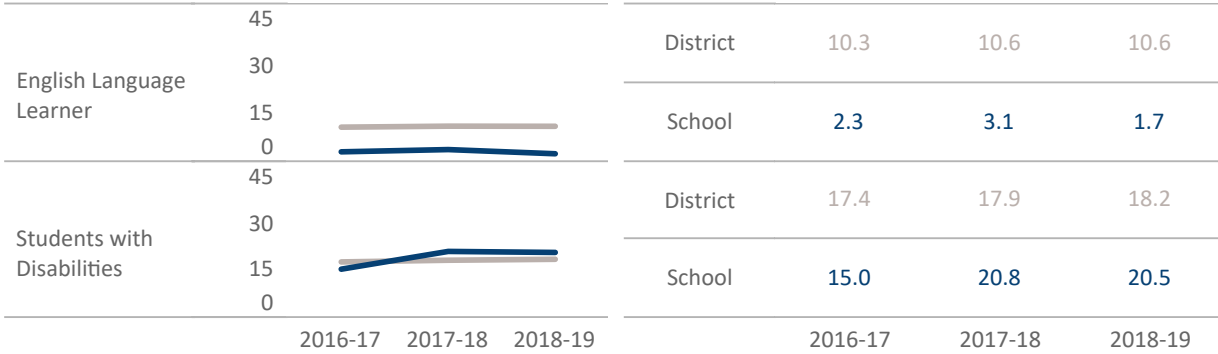
SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	PROPOSED GRADES	ACTUAL GRADES
2015-16	475	517	109%	K-5	K-5
2016-17	475	546	115%	K-5	K-5
2017-18	475	543	114%	K-5	K-5
2018-19	475	521	110%	K-5	K-5
2019-20	475	507	107%	K-5	K-5

APPENDIX A: School Overview

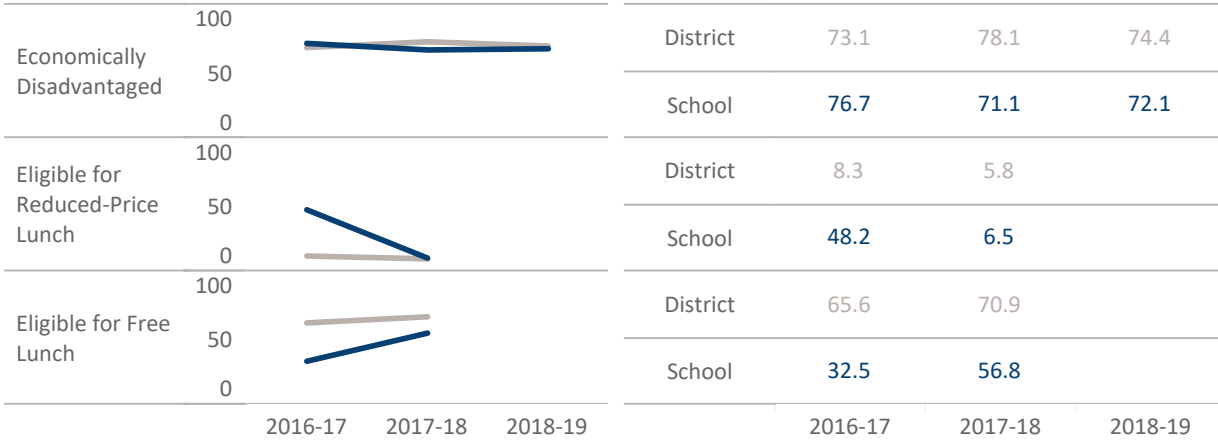
Merrick Academy - Queens Public Charter School

Queens CSD 29

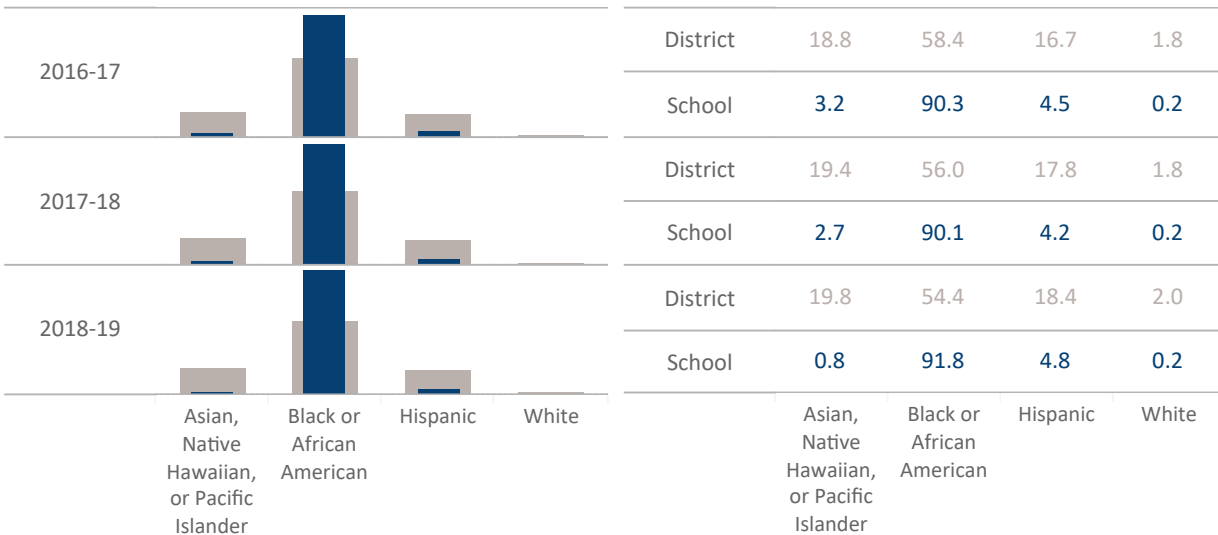
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

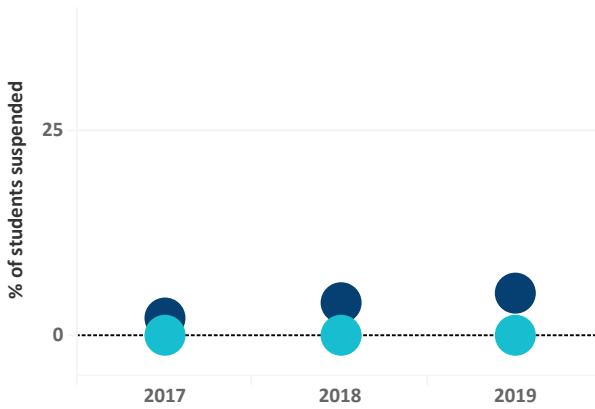


Data reported in these charts reflect BEDS day enrollment counts as reported by the New York State Education Department

APPENDIX A: School Overview

Merrick Academy - Queens Public Charter School

Queens CSD 29



	School ISS Rate	School OSS Rate
2017	0.0	2.0
2018	0.0	3.8
2019	0.0	5.2

CSD data suitable for comparison are not available. The percentage rate shown here is calculated using the method employed by the New York City Department of Education ("NYCDOE"): the total number of students receiving an in school or out of school suspension at any time during the school year is divided by the total enrollment, then multiplied by 100.

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



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

	2017	2018	2019
	0	0	0

Merrick Academy - Queens Public Charter School's Enrollment and Retention Status: 2018-19

			District Target	School
Enrollment	economically disadvantaged		84.4	72.1
	English language learners		9.2	1.7
	students with disabilities		14.0	18.0
Retention	economically disadvantaged		93.5	96.5
	English language learners		93.7	100.0
	students with disabilities		93.3	95.8

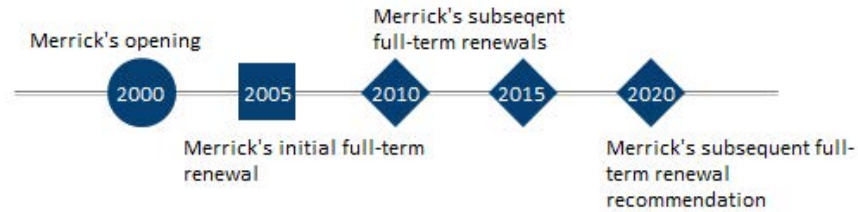
Data reported in these charts reflect information reported by the school and validated by the Institute.

APPENDIX A: School Overview

PARENT SATISFACTION: SURVEY RESULTS

RESPONSE RATE 74%	OVERALL SATISFACTION 94%	TRUST 95%	EFFECTIVE SCHOOL LEADERSHIP 96%	STRONG FAMILY COMMUNITY TIES 94%
-----------------------------	------------------------------------	---------------------	---	--

TIMELINE OF CHARTER SCHOOL RENEWAL



SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2000-01	First Year Visit	May 22, 2001
2001-02	Evaluation Visit	May 13, 2002
2002-03	Evaluation Visit	January 15-16, 2003
2003-04	Initial Renewal Visit	Spring 2004
2006-07	Evaluation Visit	May 24, 2007
2007-08	Evaluation Visit	May 13-14, 2008
2009-10	Subsequent Renewal Visit	November 6, 2009
2011-12	Evaluation Visit	February 15-16, 2012
2014-15	Subsequent Renewal Visit	November 13, 2014
2015-16	Evaluation Visit	March 22 and June 1, 2016
2017-18	Evaluation Visit	April 18-19, 2018
2018-19	Evaluation Visit	April 9-10, 2019
2019-20	Subsequent Renewal Visit	October 16-17, 2019

CONDUCT OF THE RENEWAL VISIT

DATE(S) OF VISIT	EVALUATION TEAM MEMBERS	TITLE
October 16-17, 2019	Kerri Rizzolo	Senior Analyst
	Andrew Kile	Director of School Evaluation
	Sinnjinn Bucknell	Director of Performance and Systems
	Katherine Malitzky	School Evaluation Analyst
	Sally Bachofer	External Consultant

APPENDIX A: School Overview

KEY DESIGN ELEMENTS:

ELEMENT	EVIDENT?
Inquiry of equity	+
Critical thinking and inquiry based pedagogy	-
Literacy drives student agency	+
Inquiry driven pedagogical cycles	+
Inquiry stance of leadership	+
A Supportive Community for All Learners and Families	+

APPENDIX B: Performance Summaries

SCHOOL PERFORMANCE SUMMARY: MATHEMATICS

Merrick Academy - Queens Public Charter School

		2016-17				2017-18				2018-19							
		Grades Served K-5				Grades Served K-5				Grades Served K-5							
		Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET				
1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.		3	27.8 (79)	28.4 (74)		3	47.2 (72)	49.2 (61)		3	52.9 (87)	55.4 (74)					
		4	24.8 (109)	29.7 (91)		4	39.3 (84)	43.5 (69)		4	52.6 (76)	51.5 (66)					
		5	40.7 (81)	41.9 (74)		5	28.9 (90)	29.1 (86)		5	42.2 (83)	42.5 (80)					
		6	(0)	(0)		6	(0)	(0)		6	(0)	(0)					
		7	(0)	(0)		7	(0)	(0)		7	(0)	(0)					
		8	(0)	(0)		8	(0)	(0)		8	(0)	(0)					
		All	30.5 (269)	33.1 (239)	NO	All	37.8 (246)	39.4 (216)	NO	All	49.2 (246)	49.5 (220)	NO				
	2. Each year the school's aggregate Performance Index on the State exam will meet the Measure of Interim Progress set forth in the State's ESSA accountability system.	Grades		PI	MIP		Grades	PI	MIP		Grades	PI	MIP				
		3-5	95	109	NO	3-5	110	103	YES	3-5	141	107	YES				
	3. Each year the percent of students enrolled in at least their second year and performing at or above proficiency will be greater than that of students in the same grades in the local district.	Comparison: Queens CSD 29		Grades	School	District	Comparison: Queens CSD 29		Grades	School	District	Comparison: Queens CSD 29		Grades	School	District	
		3-5	33.1	33.7	NO			3-5	39.4	38.1	YES			3-5	49.5	40.5	
4. Each year the school will exceed its predicted performance on the state exam by an effect size of 0.3 or above based on a regression analysis controlling for economically disadvantaged students statewide.		Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	
		3	74.7	27.8	41.1	-0.68	3	68.9	47.2	50.1	-0.15	3	69.1	600	598.3	0.20	
		4	75.0	24.8	34.1	-0.50	4	66.7	39.3	44.9	-0.28	4	75.9	602	596.7	0.54	
		5	73.8	40.7	34.4	0.35	5	68.9	28.9	38.8	-0.56	5	54.7	601	601.0	0.00	
		6					6					6					
		7					7					7					
		8					8					8					
		All	74.6	30.5	36.2	-0.30	NO	All	68.1	37.8	44.2	-0.34	NO	All	66.3	601.0	598.7
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.	Comparison: Queens CSD 29		Grades	School	State	Comparison: Queens CSD 29		Grades	School	State	Comparison: Queens CSD 29		Grades	School	State		
			4	39.7	50	NO			4	63.9	50	YES			4	59.3	50
			5	56.3	50	NO			5	49.8	50	YES			5	63.4	50
			6	0.0	50	NO			6	0.0	50	YES			6	0.0	50
			7	0.0	50	NO			7	0.0	50	YES			7	0.0	50
			8	0.0	50	NO			8	0.0	50	YES			8	0.0	50
			All	46.8	50	NO			All	56.4	50	YES			All	61.6	50

APPENDIX C: District Comments

SUMMARY OF PUBLIC COMMENTS

The New York City Department of Education held its required hearing on Merrick's renewal application on October 24, 2019 at the school. Thirty-five people were present and 13 spoke in support of the renewal application. No one spoke in opposition. A CEC 29 member who worked with the NYCDOE for 33 years spoke in support of school's warmth and inclusion of all children. She cited the partnership between parents and administration. Teachers spoke of a great environment that focuses on the whole child. Parents spoke of how the school is part of the community and should continue to allow others access to the education offered.

Under separate written submissions, parents wrote in support of renewal citing the vision of the school. Several families wrote of the positive experience of their students with IEPs thrive in the environment and have gained in academics and related service therapies. One teacher wrote of how he/she was almost done with teaching but due to the supportive environment of Merrick, is pursuing a doctorate in education. Another teacher, who once worked at turn-around school, believes the school is on the right track for success due to new schoolwide organization, curriculum, increased professional development, increased parental involvement and a sense of urgency as to learning.

Several representatives also provided written comment in support of the renewal application including Congressman Gregory W. Meeks, Senator Kevin Thomas, Assemblywoman Alicia Hyndman, and Council Member Donovan Richards citing the positive impact the school has had in the community since its opening and congratulating the school on the educational opportunity and school choice it has provided the students. The representatives cited the school's record of outperforming district schools as evidence of this positive impact. Senator Thomas also previously served as a board member of the school and commented how the leadership and faculty are dedicated to developing the whole child and preparing them for the future.

APPENDIX D: Fiscal Dashboard

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

SCHOOL INFORMATION

BALANCE SHEET

Opened 2000-01

Assets

Current Assets

	2014-15	2015-16	2016-17	2017-18	2018-19
Cash and Cash Equivalents - GRAPH 1	2,157	1,405,540	1,968,051	2,037,670	953,473
Grants and Contracts Receivable	108,467	247,229	289,296	384,646	239,556
Accounts Receivable	8,281	8,281	-	-	-
Prepaid Expenses	111,636	215	67,918	69,616	83,356
Contributions and Other Receivables	-	-	-	-	-
Total Current Assets - GRAPH 1	230,541	1,661,265	2,325,265	2,491,932	1,276,385
Property, Building and Equipment, net	497,176	423,747	530,799	608,009	800,922
Other Assets	252,643	252,523	202,774	203,112	203,361
Total Assets - GRAPH 1	980,360	2,337,535	3,058,838	3,303,053	2,280,668

Liabilities and Net Assets

Current Liabilities

Accounts Payable and Accrued Expenses	123,753	397,898	113,106	235,588	202,559
Accrued Payroll and Benefits	471,052	498,683	598,079	694,681	777,261
Deferred Revenue	-	1,661	35,284	-	-
Current Maturities of Long-Term Debt	-	-	-	-	-
Short Term Debt - Bonds, Notes Payable	-	-	-	-	-
Other	162,004	206,844	270,674	-	-
Total Current Liabilities - GRAPH 1	756,809	1,105,086	1,017,143	930,269	979,820
Deferred Rent/Lease Liability	-	-	-	237,127	221,575
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	756,809	1,105,086	1,017,143	1,167,396	1,201,395

Net Assets

Unrestricted	223,551	1,232,449	2,040,195	2,134,157	1,079,273
Temporarily restricted	-	-	1,500	1,500	-
Total Net Assets	223,551	1,232,449	2,041,695	2,135,657	1,079,273
Total Liabilities and Net Assets	980,360	2,337,535	3,058,838	3,303,053	2,280,668

ACTIVITIES

Operating Revenue

Resident Student Enrollment	6,844,028	7,167,471	7,869,078	8,081,280	8,231,513
Students with Disabilities	421,555	760,530	954,023	1,253,949	1,420,145
Grants and Contracts					
State and local	-	155,944	43,730	-	-
Federal - Title and IDEA	176,790	186,164	175,658	322,313	261,049
Federal - Other	-	-	12,794	-	-
Other	-	2,049	-	-	-
NYC DoE Rental Assistance	-	-	-	-	-
Food Service/Child Nutrition Program	120,603	-	-	-	-
Total Operating Revenue	7,562,976	8,272,158	9,055,283	9,657,542	9,912,707

Expenses

Regular Education	6,094,208	4,780,441	5,069,663	5,797,330	6,313,022
SPED	1,111,448	1,781,864	2,283,661	2,606,903	3,016,156
Other	-	-	-	-	-
Total Program Services	7,205,656	6,562,305	7,353,324	8,404,233	9,329,178
Management and General	1,133,548	701,599	910,980	1,246,433	1,680,459
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	8,339,204	7,263,904	8,264,304	9,650,666	11,009,637
Surplus / (Deficit) From School Operations	(776,228)	1,008,254	790,979	6,876	(1,096,930)

Support and Other Revenue

Contributions	3,265	183	1,500	1,450	11,000
Fundraising	-	-	-	-	-
Miscellaneous Income	1,062	461	16,767	85,636	29,546
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	4,327	644	18,267	87,086	40,546

Total Unrestricted Revenue	7,269,910	8,272,802	9,072,050	9,744,628	9,953,253
Total Temporarily Restricted Revenue	297,393	-	1,500	-	-
Total Revenue - GRAPHS 2 & 3	7,567,303	8,272,802	9,073,550	9,744,628	9,953,253

Change in Net Assets	(771,901)	1,008,898	809,246	93,962	(1,056,384)
Net Assets - Beginning of Year - GRAPH 2	995,452	223,551	1,232,449	2,041,695	2,135,657
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	223,551	1,232,449	2,041,695	2,135,657	1,079,273

APPENDIX D: Fiscal Dashboard

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2014-15	2015-16	2016-17	2017-18	2018-19
Personnel Service					
Administrative Staff Personnel	707,914	624,784	960,634	1,293,033	1,448,040
Instructional Personnel	2,629,095	2,576,846	3,135,896	3,773,143	4,418,624
Non-Instructional Personnel	149,645	109,857	57,575	264,017	419,751
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	3,486,654	3,311,487	4,154,105	5,330,193	6,286,415
Fringe Benefits & Payroll Taxes	996,853	995,348	907,004	1,230,200	1,415,333
Retirement	50,203	63,480	75,413	77,056	128,456
Management Company Fees	585,000	625,790	-	-	55,070
Building and Land Rent / Lease	830,277	830,278	830,277	830,278	832,092
Staff Development	105,950	70,071	164,066	223,061	135,380
Professional Fees, Consultant & Purchased Services	396,647	100,150	609,357	678,489	685,016
Marketing / Recruitment	28,412	70,764	45,054	36,875	78,492
Student Supplies, Materials & Services	607,661	254,331	449,310	416,364	327,024
Depreciation	157,858	150,798	207,158	256,805	344,896
Other	1,093,689	791,407	822,560	571,345	721,463
Total Expenses	8,339,204	7,263,904	8,264,304	9,650,666	11,009,637

SCHOOL ANALYSIS

ENROLLMENT

	2014-15	2015-16	2016-17	2017-18	2018-19
Original Chartered Enrollment	540	475	475	475	475
Final Chartered Enrollment (includes any revisions)	540	475	475	475	475
Actual Enrollment - GRAPH 4	498	517	546	543	521
Chartered Grades	K-6	K-5	K-5	K-5	K-5
Final Chartered Grades (includes any revisions)	-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2014-15	2015-16	2016-17	2017-18	2018-19
	13,877	13,877	14,027	14,527	15,307
Increase over prior year	2.5%	0.0%	1.1%	3.4%	5.1%

PER STUDENT BREAKDOWN

Revenue

Operating	15,175	15,994	16,590	17,785	19,029
Other Revenue and Support	9	1	33	160	78
TOTAL - GRAPH 3	15,184	15,995	16,624	17,946	19,107

Expenses

Program Services	14,458	12,688	13,472	15,477	17,909
Management and General, Fundraising	2,274	1,357	1,669	2,295	3,226
TOTAL - GRAPH 3	16,732	14,045	15,141	17,773	21,135
% of Program Services	86.4%	90.3%	89.0%	87.1%	84.7%
% of Management and Other	13.6%	9.7%	11.0%	12.9%	15.3%
% of Revenue Exceeding Expenses - GRAPH 5	-9.3%	13.9%	9.8%	1.0%	-9.6%

Student to Faculty Ratio

	11.9	6.9	10.3	10.1	8.1
--	------	-----	------	------	-----

Faculty to Admin Ratio

	3.8	8.3	4.1	7.7	4.3
--	-----	-----	-----	-----	-----

Financial Responsibility Composite Scores - GRAPH 6

Score	2014-15	2015-16	2016-17	2017-18	2018-19
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	0.2	2.2	2.5	2.2	1.1
	Fiscally Needs Monitoring	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Adequate

Working Capital - GRAPH 7

Net Working Capital	(526,268)	556,179	1,308,122	1,561,663	296,565
As % of Unrestricted Revenue	-7.2%	6.7%	14.4%	16.0%	3.0%
Working Capital (Current) Ratio Score	0.3	1.5	2.3	2.7	1.3
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	HIGH	MEDIUM	MEDIUM	MEDIUM	HIGH
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	Poor	Good	Good	Good	Poor

Quick (Acid Test) Ratio

Score	0.2	1.5	2.2	2.6	1.2
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	HIGH	MEDIUM	MEDIUM	LOW	MEDIUM
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	Poor	Good	Good	Excellent	Good

Debt to Asset Ratio - GRAPH 7

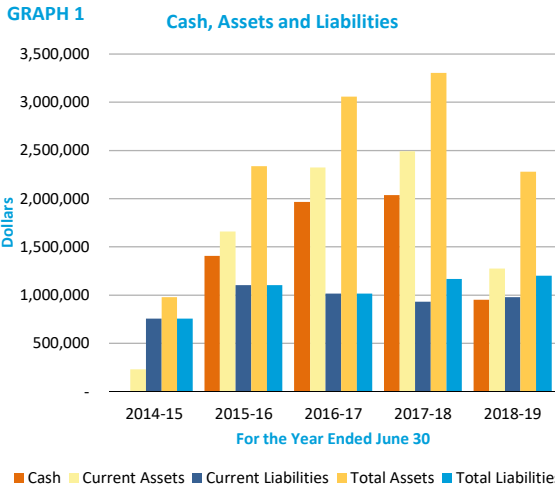
Score	0.8	0.5	0.3	0.4	0.5
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	MEDIUM	MEDIUM	LOW	LOW	MEDIUM
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	Good	Good	Excellent	Excellent	Good

Months of Cash - GRAPH 8

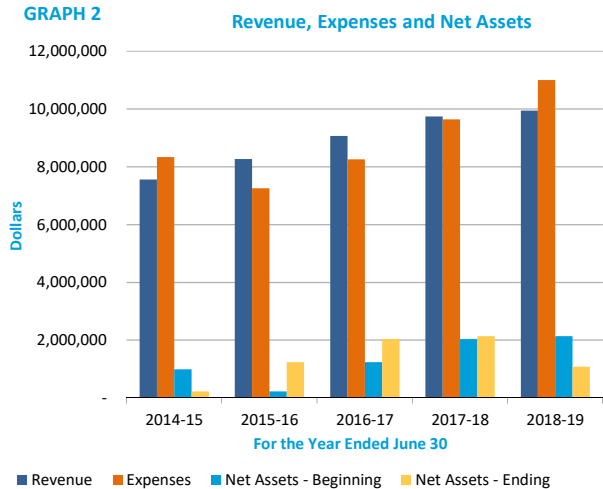
Score	0.0	2.3	2.9	2.5	1.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	HIGH	MEDIUM	MEDIUM	MEDIUM	MEDIUM
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	Poor	Good	Good	Good	Good

APPENDIX D: Fiscal Dashboard

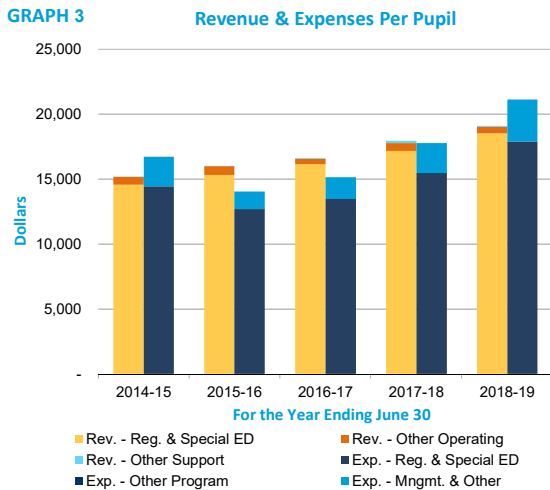
MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL



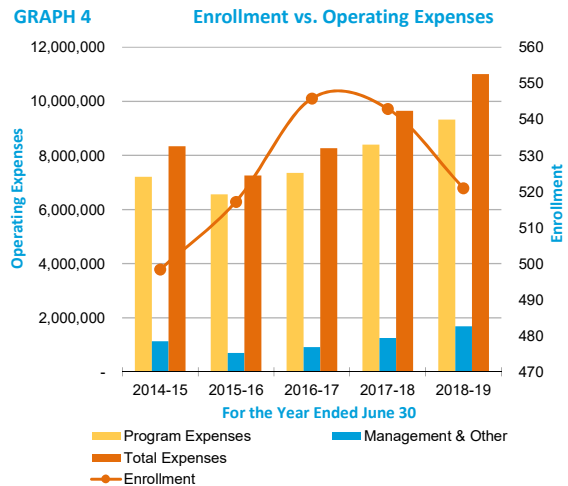
This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 through 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally speaking, the bigger that gap, the better.



This chart illustrates total revenue and expenses each year and the relationship those subsets have on the increase/decrease of net assets on a year-to-year basis. Ideally subset 1, revenue, will be taller than subset 2, expenses, and as a result subset 3, net assets - beginning, will increase each year, building a more fiscally viable school.



This chart illustrates the breakdown of revenue and expenses on a per pupil basis. Caution should be exercised in making school-by-school comparisons since schools serving different missions or student populations are likely to have substantially different educational cost bases. Comparisons with similar schools with similar dynamics are most valid.

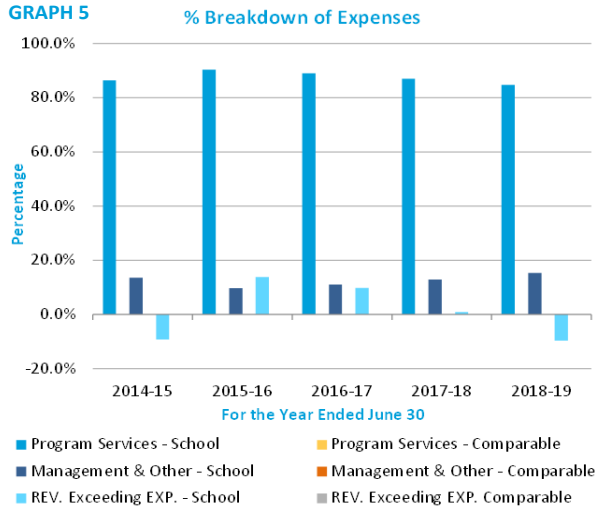


This chart illustrates to what extent the school's operating expenses have followed its student enrollment pattern. A baseline assumption that this data tests is that operating expenses increase with each additional student served. This chart also compares and contrasts growth trends of both, giving insight into what a reasonable expectation might be in terms of economies of scale.

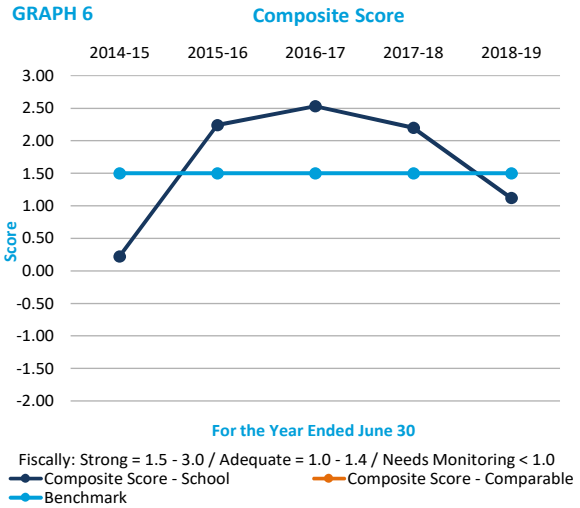
APPENDIX D: Fiscal Dashboard

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

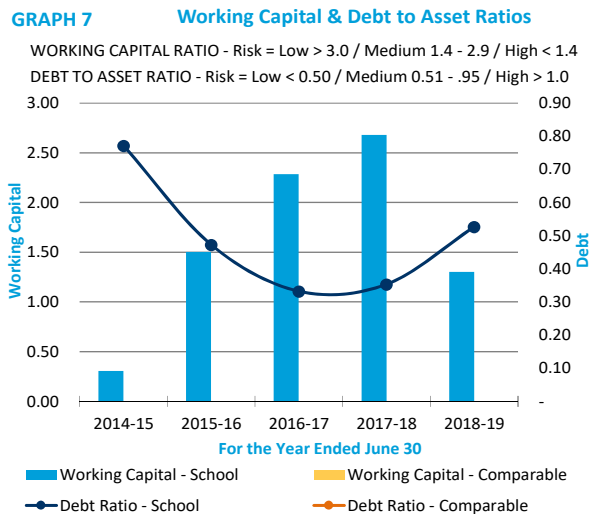
Comparable School, Region or Network: -



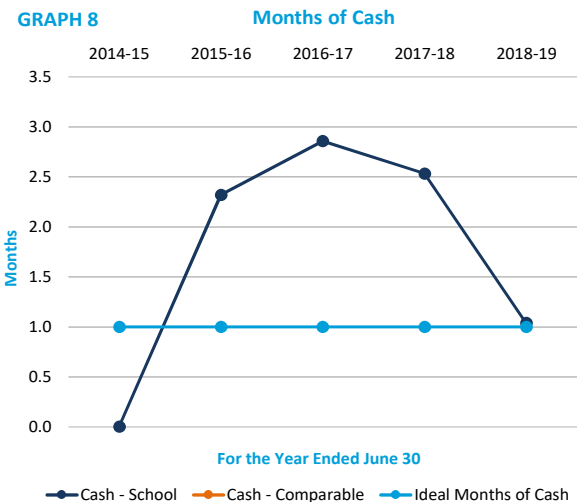
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding expenses should not be negative. Similar caution, as mentioned on GRAPH 3, should be used in comparing schools.



This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid for observing the fiscal trends of a particular school and used as a tool to compare the results of different schools.



This chart illustrates working capital and debt to asset ratios. The working capital ratio indicates if a school has enough short-term assets to cover its immediate liabilities/short term debt. The debt to asset ratio indicates what proportion of debt a school has relative to its assets. The measure gives an idea to the leverage of the school along with the potential risks the school faces in terms of its debt-load.



This chart illustrates how many months of cash the school has in reserves. This metric is to measure solvency – the school's ability to pay debts and claims as they come due. This gives some idea of how long a school could continue its ongoing operating costs without tapping into some other, non-cash form of financing in the event that revenues were to cease flowing to the school.

