



THE SUNY CHARTER SCHOOLS INSTITUTE

*RENEWAL RECOMMENDATION REPORT
BRONX CHARTER SCHOOL
FOR EXCELLENCE*

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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/](http://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?

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.

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



RENEWAL RECOMMENDATION

Full-Term Renewal The Institute recommends that the SUNY Trustees approve the Application for Charter Renewal of Bronx Charter School for Excellence and renew Bronx Charter School for Excellence’s authority to operate the school for a period of five years with authority to provide instruction to students in Kindergarten – 8th grade in such configuration as set forth in its Application for Charter Renewal, with a projected total enrollment of 810 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 open and operating charter schools. Bronx Charter School for Excellence (“Bronx Excellence”) received a full-term renewal from the SUNY Trustees in 2014, and was given targets at that time. Charter schools are required 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 for students with disabilities, ELLs, and FRPL eligible students. The Institute communicates specific targets for each school during its first year of operation or at renewal.

Bronx Excellence makes good faith efforts to recruit and retain at-risk students. Bronx Excellence nearly meets its enrollment target for ELLs. The school is not currently meeting its enrollment targets for economically disadvantaged students and students with disabilities. The school is meeting its retention targets for all three subgroups of students. The school will implement the following strategies to ensure it meets its targets in any future charter term:

- conducting open houses, public meetings, meet and greets, and presentations at community organizations such as preschools, daycare centers, head start programs, English as a second language programs for adults with school aged children, health centers, doctors' offices, libraries, family service providers, housing associations, counseling centers and support groups, tutoring groups, and places of worship;
- canvassing neighborhoods with informational fliers, specifically in areas with higher concentrations of public housing developments in proximity to the school's location and multicultural communities;
- distributing flyers and applications in English, Spanish, and other common languages with targeting outreach to economically disadvantaged communities;
- advertising on local media outlets that target English and languages other than English speaking audiences;
- supporting recruitment efforts with bilingual staff members and translation service providers for prospective families whose native language is one other than English;
- informing families about the student support services department and the services the school provides; and,
- facilitating family chats with individual families during enrollment to discuss expectations, and student needs, particularly for families of students with disabilities and ELLs.

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.

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

BRONX CHARTER SCHOOL FOR EXCELLENCE

BACKGROUND

The SUNY Trustees approved the original charter for Bronx Excellence in February of 2003. The school opened its doors in the fall of 2004 initially serving 100 students in Kindergarten and 1st grade. The school is authorized to serve 756 students in Kindergarten – 8th grade during the 2018-19 school year and, if renewed, will continue to serve students in Kindergarten – 8th grade, with a projected total enrollment of 810 students.

The current charter term expires on July 31, 2019. A subsequent charter term would enable the Bronx Charter School for Excellence education corporation (“BCSE” or the “education corporation”) to operate the school through July 31, 2024. Bronx Excellence is located in privately owned space in New York City Community School District (“CSD”) 11. Kindergarten – 4th grade are located at 1960 Benedict Avenue, Bronx, NY and 5th – 8th grade are located in an adjacent building at 1952 Benedict Avenue, Bronx, NY.

The mission of Bronx Excellence is:



The Bronx Charter Schools for Excellence prepares young people in New York City to compete for admission to and succeed in top public, private, and parochial high schools by cultivating their intellectual, artistic, social, emotional, and ethical development. The Bronx Charter Schools for Excellence accomplishes this by offering a challenging and rigorous academic curriculum, which at the earliest of grades has an eye toward college preparation. The Bronx Charter Schools for Excellence achieves this in a supportive and caring environment that maintains high expectations for all students.

BCSE contracts with Excellence Community Schools, Inc. (“Excellence Community Schools” or the “network”), a New York not-for-profit corporation that serves as the charter management organization (“CMO”). The network contracts with the four open and operating charter schools in New York operated by BCSE and one charter school in Connecticut, and provides operational, instructional, fiscal, and performance management support pursuant to a contract. The SUNY Trustees authorize five schools in New York City operated by BCSE. Four of the schools are currently open and the fifth will open in the fall of 2019. The Act allows authorizers to grant charter school education corporations the authority to operate more than one school under Education Law § 2853(1)(b-1) through the approval of new schools as set forth in the Act, or through merger with one or more education corporations.

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Bronx Excellence is an academic success having met or come close to meeting its key Accountability Plan goals. The school demonstrates success in the following ways:

- Over the charter term, Bronx Excellence has consistently outperformed the district in ELA. In 2017-18, 61% of Bronx Excellence students enrolled in at least their second year scored at or above proficiency compared to 37% in the district. The school exceeded the target for its effect size measure for each year of the charter term. In 2017-18, Bronx Excellence surpassed the target of 0.3 with an effect size of 1.29 demonstrating that the school performed better than expected to a large degree compared to schools across the state enrolling similar proportions of economically disadvantaged students.
- In mathematics, Bronx Excellence has also consistently outperformed the district. In 2017-18, 67% of Bronx Excellence students in at least their second year at the school scored at or above proficiency, more than double the 30% of students scoring at or above proficient in the district. The school exceeded the target for its effect size measure for each year of the charter term. In 2017-18, the school's effect size of 1.56 surpassed the target of 0.3 demonstrating that the school performed higher than expected to a large degree in comparison to schools across the state enrolling similar percentages of economically disadvantaged students.
- Bronx Excellence met its science Accountability Plan goal each year of the charter term, outperforming the district and surpassing the target of 75% scoring at or above proficiency. In 2017-18, 96% of 4th and 8th grade students performed at or above proficiency on the science assessment. Notably, 83% of 4th grade students scored a level 4, the highest level.
- In 2017-18, the school administered multiple Regents exams to 8th grade students with high success rates. The school administered the Living Environments Science Regents Exam to 27 students, the Algebra 1 Regents Exam to 15 students, the Spanish Languages other than English state approved Regents Exam to 16 students; for each of these exams 100% of students who took the exams passed. The school also administered the U.S. History and Government Regents exam to 31 8th grade students with 97% of students passing. The school also administered the Geometry Regents Exam to three 8th grade students; however, the Institute does not report assessment results for groups containing five or fewer students in compliance with the Family Educational Rights and Privacy Act regulations on reporting education outcome data.

- Bronx Excellence provides robust support to its alumni in navigating the high school and college admissions processes. Notably, 8th grade graduates from 2018 attend top high schools such as Stuyvesant High School, Bard Early College High School, The Lawrenceville School, and Fordham Preparatory School. The school's third cohort of high school alumni have received college acceptances to schools including Massachusetts Institute of Technology, Carnegie Mellon University, Drexel University, Fordham University, Penn State, and University of Michigan.

During the charter term, Bronx Excellence has strengthened its curricular and assessment programs, built out its leadership capacity, and refined its structures to support teacher and leader development. As a result, the school has met or come close to meeting its Accountability Plan goals during the charter term.

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 submitted by the school; 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 Bronx Excellence a Subsequent Full-Term Renewal of five years.

NOTEWORTHY

In keeping with Bronx Excellence's commitment to develop students' critical thinking skills and global perspective taking, the school is committed to providing students opportunities to engage in STEM programs in and out of school. Students in 8th grade at Bronx Excellence have the opportunity to attend STEM summer programming at Colgate University. The week long program has included experiences such as coding and application development. In addition, Bronx Excellence students have the opportunity to visit and learn from leaders at innovative companies like Google and Amazon. Another way in which the school supports this STEM initiative is with the addition of an innovation floor and a fully equipped chemistry laboratory in the newly built middle school building. The school intends to develop courses in coding, 3D printing, and application design for students in the middle school grades.

ACADEMIC PERFORMANCE



IS THE SCHOOL AN ACADEMIC SUCCESS?

Bronx Excellence is an academic success having met or come close to meeting its Accountability Plan goals over the charter term. The school's academic program is strong, effective, and supported by high quality instructional and organizational leadership.

At the beginning of the Accountability Period,⁵ 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 PERFOR-
MANCE, I.E., HOW DID THE
SCHOOL DO AS COMPARED
TO SCHOOLS IN THE
DISTRICT AND SCHOOLS
THAT SERVE SIMILAR
POPULATIONS OF ECO-
NOMICALLY DISADVAN-
TAGED STUDENTS?

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

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.

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. Bronx Excellence did not 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 initial 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

6. Education Law § 2850(2)(f).

7. Education Law § 2854(1)(d).

while also 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 attainment, comparison to local district, comparison to demographically similar schools, student growth, and high school graduation and college going rates, as 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 Bronx Excellence 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 Bronx Excellence's demonstrated student learning compared to other schools' demonstrated student learning. Notwithstanding the validity of the measures within a given school year, it is important to recognize changes in the administration of the state exams and cautiously interpret year over year trends in achievement scores.

The Institute uses the state's growth percentile analysis as a measure of Bronx Excellence'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 help students make one year's worth of growth 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.

The Accountability Plan also includes a science goal and a goal for performance under the former the No Child Left Behind ("NCLB"), accountability system, which will be replaced by Every Student Succeeds Act ("ESSA") goals in the future.

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SUNY RENEWAL BENCHMARK 1A

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

Over its third charter term, Bronx Excellence demonstrated strong achievement in ELA and mathematics meeting or coming close to meeting its goals in all five years of its Accountability Period. From 2013-14 through 2017-18, the school outperformed at least 80% of all schools statewide in ELA and 75% of all schools statewide in mathematics. The school also met its science and state accountability goals over the charter term.

Bronx Excellence met or came close to meeting its ELA goal throughout the charter term. The school met its goal from 2013-14 through 2015-16, when it exceeded the target for all available comparative and growth measures included under its goal. Over those three years the school's students enrolled in at least their second year posted proficiency rates on the state's ELA exam that surpassed the district. Additionally, the school performed higher than expected to a large degree in comparison to schools across the state enrolling similar proportions of economically disadvantaged students. The school exceeded the target of 50 for its growth measure in 2013-14, 2014-15, and 2015-16. In the following two years, the school posted mean growth percentiles that fell slightly under the target. In contrast, Bronx Excellence continued to demonstrate strong comparative achievement, outperforming the district by 31 percentage points in 2016-17 and 24 percentage points in 2017-18. The school also continued to exceed the target for its comparative effect size measure in both years, performing higher than expected to a large degree compared to demographically similar schools.

Bronx Excellence also met its mathematics goal over the charter term. The school's students enrolled in at least their second year outperformed the district in every year of the Accountability Period. In 2017-18, with 67% of the school's students in 3rd – 8th grade scoring at or above proficiency, the school exceeded the district's performance by 37 percentage points. Bronx Excellence also exceeded the target for its comparative effect size measure in every year. In comparison to schools across the state enrolling similar percentages of economically disadvantaged students, the school performed higher than expected to a large degree in each year of the Accountability Period. The school also demonstrated strong growth throughout the term posting mean growth percentiles that exceeded the target of 50 in four of five years of the Accountability Period.

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Bronx Excellence met its science goal over the charter term. In every year from 2013-14 through 2017-18, the school exceeded the target for the absolute and comparative measure included under its goal. The school's students in 4th and 8th grade enrolled in at least their second year posted proficiency rates above the target of 75% each year. Additionally, the school outperformed the district by at least 25 percentage points in every year. Notably in 2017-18, 59% of the school's tested 4th and 8th grade students scored at performance level 4 on the state science exam indicating performance above grade level expectations.

The school met its state accountability goal over the charter term.

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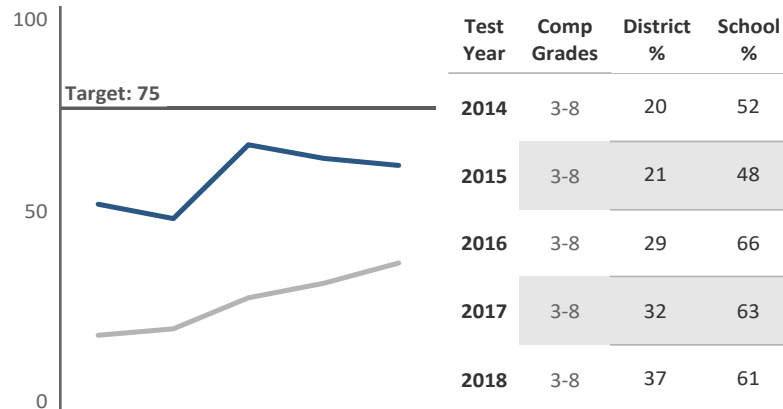
ACADEMIC PERFORMANCE

BRONX CHARTER SCHOOL FOR EXCELLENCE

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

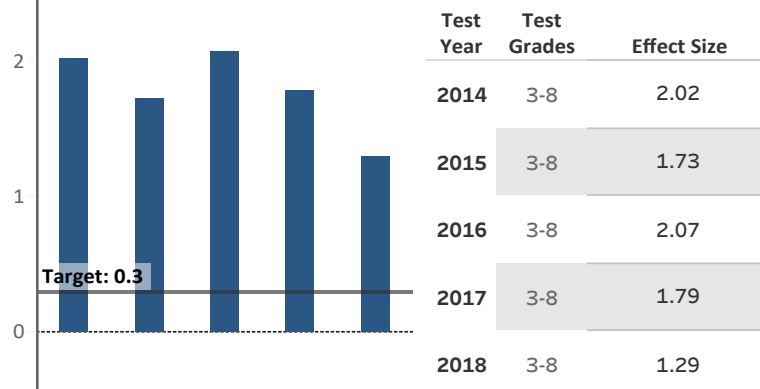
Comparative Measure:

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**.



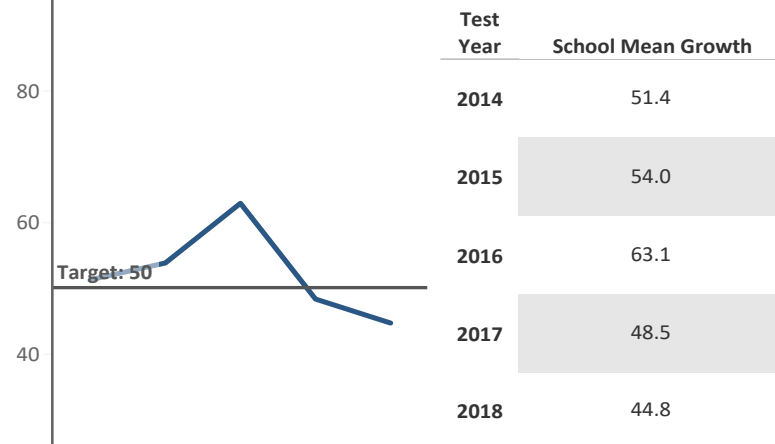
Comparative Measure:

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.



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 the state's unadjusted median growth percentile in **ELA**.



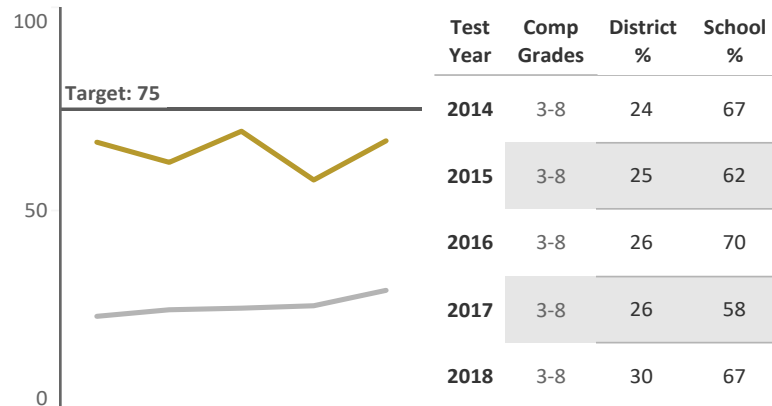
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ACADEMIC PERFORMANCE

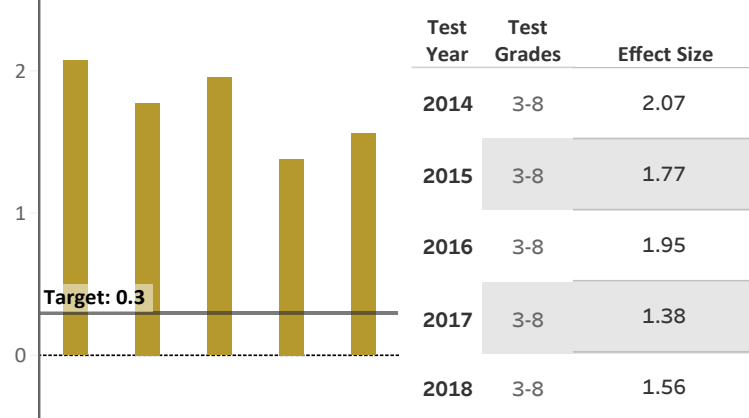
BRONX CHARTER SCHOOL FOR EXCELLENCE

MATHEMATICS ACCOUNTABILITY PLAN GOAL

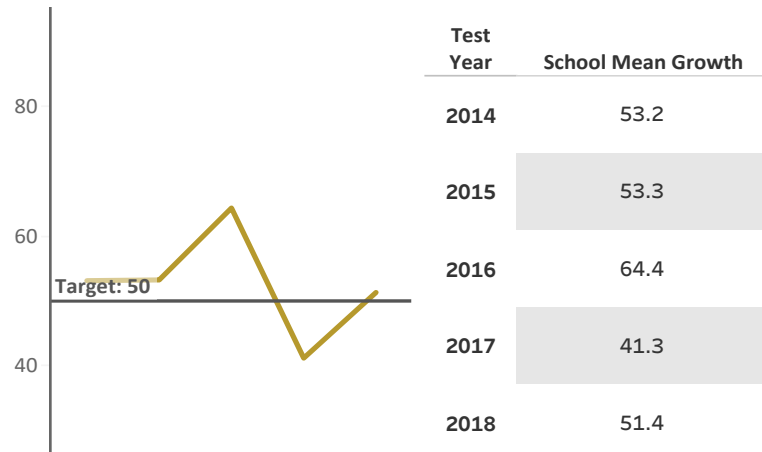
Comparative Measure: District Comparison. Each year, the percentage of students at **the school** in at least their second year performing at or above proficiency in mathematics will be greater than that of students in the same tested grades in **the district**.



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.



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 the state's unadjusted median growth percentile in **Mathematics**.

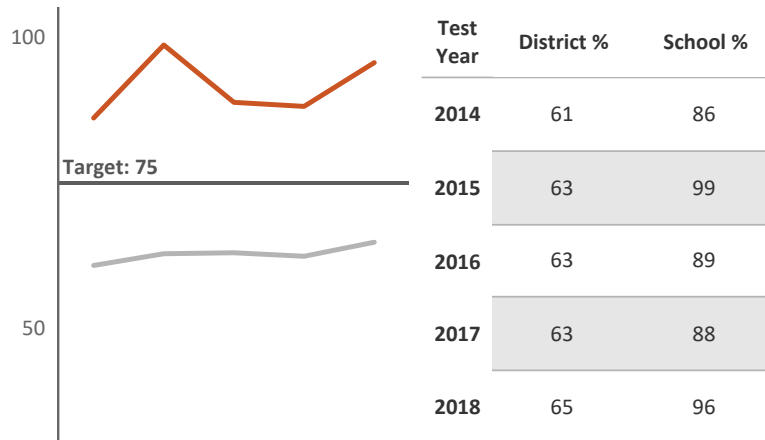


ACADEMIC PERFORMANCE

BRONX CHARTER SCHOOL FOR EXCELLENCE

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

	2016	2017	2018
Enrollment Receiving Mandated Academic Services	83	81	80
Tested on State Exam	56	54	58
School Percent Proficient on ELA Exam	35.7	20.4	17.2
District Percent Proficient	5.9	7.2	10.2
	2016	2017	2018
ELL Enrollment	60	65	75
Tested on NYSESLAT Exam	60	59	75
School Percent 'Commanding' or Making Progress on NYSESLAT	16.7	37.3	28.0

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.

**SUNY
RENEWAL
BENCHMARK
1B**

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

Bronx Excellence has an assessment system that improves instructional effectiveness and student learning. The school is reflective about its assessment program and makes adjustments when necessary. Leaders provide effective guidance to ensure teachers review assessment results regularly and use the analyses to inform instructional planning.

- The school regularly administers valid and reliable assessments aligned to the school's curriculum and state performance standards. The school administers the Fountas & Pinnell Benchmark Assessment System ("F&P") three to four times per year to measure students' reading growth as well as the NWEA Measures of Academic Progress ("MAP") two to three times per year to measure students' ELA and mathematics growth. Teachers leverage assessments from the suite of curricular and instructional tools provided by the school including those available in Collections and Journeys for ELA, Eureka and Math In Focus for mathematics, and Full Option Science System ("FOSS"). Instructional leaders collaborate with teachers to create additional unit assessments. For example, the middle school level mathematics team collaborates closely with the middle school mathematics dean to ensure assessments include rich questions connected to specific standards. Content specialists also review and update assessments to ensure standards alignment.
- Bronx Excellence has a valid and reliable process for scoring and analyzing assessments. Teachers meet regularly to review and discuss exemplar responses using a common rubric aligned to grade level standards; teachers score a sampling of student work together to ensure norming. The school also ensures a quick turnaround for scoring and analyzing assessments to help teachers leverage analyses to make instructional decisions.
- The school makes assessment data accessible to teachers, school leaders, and board members. The school utilizes Illuminate Education, an online platform that stores assessment results, provides assessment analyses, and facilitates data sharing across the school community. The data reports generated through Illuminate display how students are performing overall and in specific standards. School leaders and teachers are able to analyze overall school trends and specific student performance via Illuminate. The board also reviews student performance data regularly and schedules its meetings to align with the academic assessment points during the school year calendar. The board reviews assessment results, including MAP data, F&P data, and New York State assessment results to track student growth, progress, and changes over time.

- Teachers use assessment results to meet student needs by adjusting classroom instruction, grouping students, and identifying students for special intervention. During data days and team meetings, teachers and school leaders review assessment data results and identify opportunities to make instructional adjustments and plan student interventions. Teachers reteach concepts with low mastery based on assessment data. If more than 75% of students did not master a concept on an assessment or exit ticket, teachers coordinate with academic deans to make adjustments and re-teach the concepts through small group or whole class instruction. During weekly professional learning communities (“PLCs”), academic deans monitor teachers’ execution of action plans and strategize next steps.
- School leaders use assessment results to develop professional development and plan individualized coaching strategies. School leaders conduct regular classroom observations to assess teacher effectiveness and provide teachers with continuous feedback. Leaders provide feedback via informal classroom observations, and coach teachers by modeling and co-teaching instruction. Leaders capture all teachers’ feedback in an online tool that allows leaders to take observation notes, set goals, and share feedback with teachers.
- Bronx Excellence regularly communicates to parents about their students’ progress. The school sends parents regular progress reports highlighting student work across each subject area as well as grades on every assignment. The school sends bi-weekly notices that include student progress and key strategies for how parents can support students academically at home. Bronx Excellence uses Remind, an application for sending messages, sharing reminders on upcoming assignments, highlighting student progress, or disseminating schoolwide announcements. The school also hosts family events throughout the year where teachers and leaders communicate informally with parents about student performance and progress.

SUNY RENEWAL BENCHMARK 1C

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

Bronx Excellence's curriculum supports teachers in their instructional planning. In addition to network created curricular materials that supplement the purchased programs, leaders work closely with grade teams and during individual teacher coaching sessions to ensure lesson plans are focused and purposeful.

- Bronx Excellence provides a curricular framework with student performance expectations that serves as a fixed, underlying structure aligned to state standards and across grades. The Journeys program informs the ELA curricular program in the lower grades, and Collections in the middle school grades. For mathematics, Kindergarten – 4th grade uses Eureka Math, and 5th – 8th grade use Math In Focus, and the science curriculum is based on FOSS and is aligned to Next Generation Science Standards.
- The school provides teachers with curricular maps and pacing guides that provide a bridge between the curricular framework and lesson plans. Teachers know what to teach and when to teach it based on the supporting tools. For example, the school provides teachers with an annual pacing calendar before the start of the school year. Leveraging these tools, teachers across the school are able to develop a thoughtful approach for different elements of each lesson.
- Bronx Excellence has an effective process for selecting, developing, and reviewing its curricula. Academic deans work with teachers weekly to determine any changes to the upcoming lessons and to support their instructional planning to ensure lessons meet students' needs. Teachers review materials during team meetings and submit feedback to school leaders for revisions and updates. Throughout the school year, teachers also discuss any curricular changes based on student data analyses and student performance results.
- Teachers plan purposeful and focused lessons with the support of academic deans and content area specialists. On a weekly basis, teachers create lesson plans aligned to the school's guiding curricular documents and submit the plans to academic deans for feedback. Teachers also meet with school leaders and in grade teams weekly to review and discuss lesson plans. These meetings serve as opportunities for leaders to provide teachers with in person feedback. Leaders provide more targeted support to teachers new to the profession by providing additional time for them to practice lessons ensuring these newer teachers are well prepared to teach an effective and focused lesson.

SUNY RENEWAL BENCHMARK 1D

IS HIGH QUALITY INSTRUCTION EVIDENT THROUGHOUT THE SCHOOL?

Effective classroom instruction is evident at Bronx Excellence. School leadership is thoughtful and proactive about providing instructional support and pedagogical coaching to teachers new to the profession. During the renewal visit, Institute team members conducted 25 classroom observations following a defined protocol used in all school renewal visits.

NUMBER OF CLASSROOM OBSERVATIONS

CONTENT AREA	GRADE									
	K	1	2	3	4	5	6	7	8	Total
ELA		1	2	2	3	3		2	1	14
Math	1	1		2	1	1	2	1	1	10
Science									1	1
Total	1	2	2	4	4	4	2	3	3	25

- Teachers use tools and resources provided by the network to deliver purposeful lessons with clear objectives aligned to the school's curriculum (19 out of 25 lessons observed). Teachers post lesson objectives at the front of the classroom and present objectives using age appropriate language. The lesson activities align to articulated objectives and build on previously learned topics. In classrooms with more than one teacher, each adult has a clearly defined role and co-teaching is purposeful.
- About half of the teachers observed effectively use techniques to check for student understanding including circulating classrooms to monitor student written work and providing feedback to students, then adjusting instruction as needed (12 out of 25 lessons observed). Teachers use lesson plans with a scripted plan of action to support their instructional delivery. Some teachers deviate from these plans as needed based on effectively soliciting and responding to student feedback in the moment. In other classrooms, typically with teachers new to the profession, teachers do not deviate from the scripted lessons, and are not able to adjust instruction in the moment to ensure all of students demonstrate an understanding of the content.

- More than half of teachers include opportunities to challenge students with questions and activities that develop students' depth of understanding and higher order thinking skills (13 out of 25 lessons observed). In some classrooms, students have the opportunity to engage in peer discussions and teachers facilitate open ended discussions. Teachers prompt students to not just explain or justify their own or peers' thinking, but also asked students to elaborate on ideas previously presented. Particularly in the middle school grades, teachers pose thoughtful questions to allow students to apply concepts to real life situations and foster students' depth of understanding.
- Most teachers maintain a classroom that focuses on academic achievement (17 out of 25 lessons observed). Classroom environments are calm, and teachers create a strong sense of community. Teachers are prepared and materials are readily available for each lesson. Classrooms have many visuals to support learning and are print rich to help facilitate learning. While most teachers use appropriate pacing techniques like countdowns or timers, only some teachers are able to leverage these techniques to consistently minimize transition time. In some classrooms, typically with teachers new to the profession, teachers struggle to consistently maintain student engagement and to redirect off-task behavior effectively.

DOES THE SCHOOL HAVE STRONG INSTRUCTIONAL LEADERSHIP?

Bronx Excellence has strong instructional leadership. Leaders set annual priorities to address specific areas for improvement, communicate goals to teachers consistently, and work closely to support staff members in reaching schoolwide goals and priorities. Leaders prioritize the teacher development program to ensure teachers, specifically those new to the profession, meet the needs of students.

- Bronx Excellence's leadership establishes an environment of high expectations for teacher performance and in which teachers believe that all students can succeed. For this school year, leaders prioritize building staff members' content expertise regarding the school's curricula, developing the school's guided reading framework, and enhancing teachers' understanding of mathematics standards to help inform instructional decisions. Through the school's rigorous academic program, teachers set high expectations for students, work relentlessly to ensure that students strive for excellence, and prepare students for competitive high school programs. The school places a specific emphasis on character development to ensure students demonstrate confidence and integrity.

- Bronx Excellence has a robust instructional leadership team to support the development of the school's novice teaching staff. For this year, the school increased its leadership team to include a principal and academic dean for Kindergarten – 2nd grade, a principal and academic dean for 3rd – 4th grade, a principal for 5th – 8th grade, and three academic deans for the middle school level who focus on ELA, mathematics, and science. The school employs a coordinator of special education position at the elementary and middle school levels. At the time of the renewal visit, the elementary position was vacant with a network staff person and school-based dean supporting the school with its at-risk program. An equally robust operations team frees up instructional leaders to focus primarily on academics. Each leadership team at the elementary and middle school levels meets weekly to align priorities and discuss progress toward schoolwide goals.
- Leaders provide sustained, systemic, and effective coaching that improves teachers' instructional effectiveness. Academic deans meet with teachers on a weekly basis to provide observation feedback, review student data, and conduct lesson plan reviews. Principals meet with deans individually on a weekly basis to discuss supports for teachers to ensure each teacher receives targeted support.
- Bronx Excellence leaders provide many opportunities for teachers to plan curriculum and instruction collaboratively. Grade teams meet on a weekly basis to review upcoming lessons, student achievement data, and pedagogical practices. Leaders also use this time to analyze student work and identify student misconceptions so that teachers can determine next steps in class lessons.
- Instructional leaders implement a comprehensive professional development program that develops teachers' competencies and skills. During professional development days, held monthly, schools from across the education corporation come together so that teachers can collaborate and learn about common topics that pertain to all schools. Leaders strategically plan sessions based on classroom observations and teacher needs so that topics interrelate with classroom practice.
- Bronx Excellence leaders regularly conduct teacher evaluations with clear criteria that accurately identify teachers' strengths and weaknesses. Through an annual review process, leaders set individual goals with teachers, utilize weekly check in meetings to monitor progress toward those goals, and conduct multiple observations with feedback throughout the year. Leaders use a common rubric to rate teachers and an online platform to share feedback with teachers on an ongoing basis.

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1F**

- Through the school's evaluation system and leaders' regular check in meetings with teachers the school holds teachers accountable for quality instruction and student achievement. Leaders weave data conversations into weekly individual and team check in meetings. Leaders reiterate schoolwide expectations and priorities through coaching meetings to ensure that teachers hold students to high expectations.

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

Bronx Excellence meets the educational needs of at-risk students including students struggling academically, students with disabilities, and ELLs. The school implements the programs with oversight provided by the network's director of student services.

- Bronx Excellence has clear procedures for identifying students who require academic intervention, students with disabilities, and ELLs. The at-risk program utilizes the school's assessment system to identify students struggling academically via ongoing data monitoring of F&P, MAP, curriculum assessments, and daily coursework. If students are not making adequate progress after teachers implement targeted tier one support in the classroom, teachers refer students to receive more targeted interventions in small group settings. If students do not make adequate progress after receiving one or more cycles of small group interventions, teachers refer students to the special education staff for a potential referral to the district Committee on Special Education ("CSE") for evaluation for special education services. The school uses the Home Language Identification Survey to identify families who speak languages other than English, then, for eligible students, administer the New York State English Identification Test for English Language Learners ("NYSITELL").
- The school has programs in place to meet the needs of at-risk students. The school provides supports to students struggling academically beginning in the general education classroom by implementing targeted tier one supports. Additionally, all students participate in daily guided reading using a walk to read model in which teachers group students across a grade by reading level. This ensures all students receive targeted support at their individual instructional levels. In addition to guided reading, students struggling academically receive additional small group instruction in ELA and mathematics. The school provides Saturday classes and afterschool tutoring as additional forms of targeted support to students in 3rd – 8th grade. For students with Individualized Education Programs ("IEPs"), Bronx Excellence provides mandated services such as special education teacher support services ("SETSS"), integrated co-teaching ("ICT"), and related

services. To meet the needs of ELL students, general education teachers deliver high quality English language instruction as part of the daily ELA curriculum, this includes ELL students participating in daily small group guided reading, and when necessary, additional small group instruction using Wilson's Foundations to support phonics development. Despite the school's approach to an English immersion program for ELLs, teachers do not consistently articulate the school's approach, specifically as it relates to ELLs acquiring listening, speaking, reading, and writing skills based on their English proficiency levels.

- Bronx Excellence has a clear system for monitoring the academic progress of at-risk students. Grade level teams meet weekly and review student work, discuss student progress, and adjust tier one interventions if necessary. Additionally, the school systematically reviews student data every six to eight weeks after each F&P and MAP assessment window. Teachers use this data to adjust small groups and plan targeted interventions.
- Teachers are aware of students' at-risk status, specifically students struggling academically and students with disabilities. At the beginning of each academic year, the network director of student services and school-based special education coordinators share students' at-risk status with classroom teachers. This includes IEP goals for students with disabilities and English language proficiency levels for ELLs. Throughout the year, teachers can access schoolwide trackers, which include ongoing student data from the Wilsons program, running records, F&P, and MAP to monitor students' progress. In its next charter term, Bronx Excellence has the opportunity to strengthen its ELL program by ensuring classroom teachers are aware of students in their classroom who have identified ELL status and actively work to support each child's specific English language proficiency goals for those students.
- The school provides effective training and professional development to at-risk program providers and teachers. The network director of student services and school-based special education coordinators provide trainings throughout the year to classroom teachers. The school also invites consultants to provide trainings during schoolwide professional development days. The at-risk staff members attend external trainings, such as offerings at the SPED Collaborative, which they use to inform the school-based training they provide.

ORGANIZATIONAL PERFORMANCE



IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

Bronx Excellence is an effective, viable organization. The network provides robust instructional and operational support to the school and the BCSE board provides appropriate oversight.

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

Bronx Excellence 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.

ARE PARENTS/GUARDIANS AND STUDENTS SATISFIED WITH THE SCHOOL?

To report on parent satisfaction with the school's program, the Institute used 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 (the "NYCDOE's") 2017-18 NYC School Survey. The NYCDOE distributes the survey every year to compile data about school culture, instruction, and systems for improvement. In 2017-18, 100% of families who received the survey responded. The majority of respondents (88%) indicated satisfaction with the school's program, and the response rate is sufficient to be useful in framing the results 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 13 parents in attendance appreciate the resources the school provides to parents on the academic program, which includes resources for parents on strategies to best support students at home. Parents are also satisfied with the frequent updates the school provides to parents on their students' academic progress including graded assessments and written feedback.

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Persistence in Enrollment. An additional indicator of parent satisfaction is persistence in enrollment. In 2017-18, 94% of Bronx Excellence 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 statewide context.

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

Bronx Excellence’s organization works effectively to deliver the educational program. With a robust operational team, instructional leaders can dedicate the majority of time to focusing on the academic program and supporting teachers.

- Bronx Excellence has a clear administrative structure with systems in place that allows the school to carry out its academic program. The operations team consists of a senior director of operations and an operations resident and additional operations support team members. The network operations director supports the school-based team on a regular basis. A director of facilities supports any facilities related issues, which further frees up the operations team to focus on supporting the academic program with any administrative needs.
- Bronx Excellence’s organizational structure establishes distinct lines of accountability with clearly defined roles and responsibilities. Teachers and leaders are clear on who to go to for what at both the school and network levels. The school spent time last year evaluating previous leadership structures and implemented a new organizational chart to better support the needs of the school and teachers with a more robust instructional leadership model.
- Bronx Excellence implements a positive behavior intervention system framework for its schoolwide discipline approach supported by a strong character development curriculum. The school’s culture is generally positive, and students are highly engaged in most lessons. The elementary level does not prescribe a consistent approach for classroom systems for behavior management. In those grades, elementary teachers have autonomy in creating classroom based systems. These vary in effectiveness from classroom to classroom. When leaders recognize issues in specific classrooms, they support by implementing

a specific and targeted system like a stoplight or clothespin chart. The middle school program has a more prescriptive approach to management that includes a system of deductions with a clear consequence chain.

- Bronx Excellence has purposeful hiring practices and works to retain high quality teachers. Recognizing the novice level of teaching staff, the school has clear systems in place to develop and train teachers new to the profession. The school also works to ensure teachers are a right culture fit for the school. The network focuses recruitment efforts on higher education institutions in the Bronx and works to employ community members that have close ties to the Bronx. The school also works to employ content experts. For example, an ELA teacher at the middle school level has worked closely in an administrative role and lived in the community, and the school worked to support the teacher in gaining credentials whose academic background was in literature.
- The school allocates resources to support the achievement of goals. Classrooms have a wide selection of books and other resources for students to use including laptops and SmartBoards. The middle school level's innovation floor features a music room with multiple instruments and a computer lab with advanced technological resources including a 3D printer for students' use.
- Bronx Excellence maintains student enrollment to meet its budgeted levels. The school has procedures in place to monitor its progress toward meeting enrollment and retention targets. The school nearly meets its enrollment target for ELLs and meets its retention targets for all three subgroups of students. The school makes good faith efforts to recruit and retain ELLs, students with disabilities, and economically disadvantaged students.
- School leaders regularly monitor and evaluate the school's programs and make changes as necessary. Last school year, the school evaluated its leadership structure and implemented changes to make a more robust leadership team structure to better support the school's novice teaching staff. During conversations with school and network leadership, instructional leaders described how they assess the effectiveness of efforts and adjust supports and resources accordingly. For example, the school had focused on improving its mathematics program during the 2017-18 school year but noticed a slight decline in ELA achievement. In response, Bronx Excellence recently made significant investments, including resources and personnel, to focus on improving the school's ELA program.

SUNY RENEWAL BENCHMARK 2D

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

BCSE's board works effectively to achieve the school's Accountability Plan goals. Over the charter term, the board has provided effective oversight enabling the school to meet or come close to meeting its Accountability Plan goals, increase staffing and student enrollment, complete facility renovations, receive approval for four additional charters and transition into a working relationship with the CMO, Excellence Community Schools, which was developed from persons originally employed by BCSE.

- The board possess the necessary skills with which to govern the school. The board has six seats. Its four members have expertise that includes management, finance, education, and law. The board includes a member employed by the CMO and an ex-officio parent representative from the school. The size of the board decreased over the charter term as several members shifted into positions on the CMO board. Over the next charter term, the board intends to increase its size and continue to strengthen its capacity, specifically focused on identifying potential members that would further diversify the board's demographic make up and possess expertise with community relations and development.
- The board requests and receives information that facilitates effective oversight of the school's academic program and finances. The board receives a data dashboard on a monthly basis that includes academic, nonacademic, and financial data. The board is also strategic when developing meeting dates as they align to the school's assessment windows ensuring the board receives academic updates in a timely manner and can discuss any areas of concern in person. In addition to the data dashboards, network staff and school-based staff provide presentations at monthly meetings.
- The board establishes clear priorities with appropriate short- and long-term goals and has in place a system to monitor the organization's progress towards meeting these goals. Over the charter term, the board focused on growth and how to effectively govern multiple schools as the trustees transitioned from overseeing one school to four open and operating schools as well as developing an effective working relationship with the CMO. Additionally, the board invests resources in tracking the high school and college success of the school's alumni to ensure the school is meeting its mission.
- The board regularly evaluates its performance and will begin to evaluate the CMO with support from Marci Cornell-Feist's Board on Track program. The education corporation board meets with the CMO board jointly twice a year to ensure aligned priorities and strengthen their working relationship.

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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 a clear understanding of its role in holding the school leadership and partner organization accountable for both academic results and fiscal soundness.

- During the charter term the board was approved to replicate the school four times over. Currently three of those replicated schools have opened.
- As the program replicated and grew, the original Friends of the Bronx Charter Schools for Excellence, Inc., which provided philanthropy and real estate, was converted into an emerging CMO. The education corporation board bifurcated with several members joining the board of the CMO.
- The first replicated school opened during the 2016-17 school year. The board shifted its responsibility from holding one school leader accountable to holding a network accountable. Board meetings now consist of a finance committee report, an academic report from individual school leaders and network data persons as well as a chief executive officer (“CEO”) report from the network. The CEO report contains information regarding growth, facilities, key school demographic information and fundraising. Depending on the time of the year, the board also receives reports from the parent organization, summer plans, and human capital.

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

The education corporation substantially complied with applicable laws, rules and regulations, and provisions of its charter with several minor exceptions.

- **Board Membership.** The BCSE board did not meet the reporting requirements of paragraphs 2.2 and 2.3 of the charter agreement in timely informing the Institute of board members who had left the board or provide the appropriate information as to new members for approval by the Institute. The board has demonstrated a strong willingness to comply with all requirements and the Institute will continue to work with members to ensure reporting omissions are diminished in a future charter term.

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- **Board Meeting Minutes.** The BCSE board also struggled to meet the requirements of Section C of the Monitoring Plan of the charter agreement in submitting board meeting minutes within 30 days of a board meeting. Board meeting minutes also must provide sufficient detail of actions taken including notation of how members of the board voted on particular items. The board's minutes have not always provided this information during the charter term. As a part of the board's and the Institute's interest in working more closely in a future charter term, the board is committed to ensuring timely and accurate reporting.
- **Complaints.** The Institute received no formal complaints regarding the school.
- **Compliance.** The Institute issued no violation letters during the charter term.

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FISCAL PERFORMANCE



IS THE EDUCATION CORPORATION FISCALLY SOUND?

Based on a review of the fiscal evidence collected through the renewal review, BCSE education corporation is fiscally sound as is its school, Bronx Excellence. The SUNY Fiscal Dashboard presents color-coded tables and charts indicating that Bronx Excellence and the education corporation have demonstrated fiscal soundness over the majority of the charter term.⁸ (The SUNY Fiscal Dashboard for Bronx Excellence is included in Appendix D and the Fiscal Dashboard for the Bronx Charter School for Excellence merged education corporation is included in Appendix F). The discussion that follows relates mainly to the Bronx Charter School for Excellence education corporation because a school is not a legally distinct fiscal entity.

The network supports Bronx Excellence in the areas of curricula, student evaluation, recruitment, training and professional development, financial management, and technology under the terms of a management contract that reflects 13% management fee over the charter term. The financial model is intended to ensure that a fully enrolled school is financially sustainable, operating the academic program solely through public funding.

Bronx Excellence opened in 2004-05 authorized by SUNY and the education corporation has since been granted the authority to operate four additional schools. In addition to analyzing the soundness of the individual charter schools, the Institute analyzed the soundness of the not-for-profit education corporation granted the authority to operate the school and finds it too has adequate financial resources to ensure stable operations. The fiscal dashboards reflect the independent entity as fiscally adequate prior to the merger and fiscally adequate as a merged entity.

BCSE successfully closed on a \$23.3 million bond financing in 2013 and received investment grade BBB- rating.

8. 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.

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SUNY RENEWAL BENCHMARK 3A

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

Bronx Excellence has the financial resources to ensure stable operations. Working with the network, the school has employed clear budgetary objectives and budget preparation procedures throughout the charter term.

- The budget process involves the school leadership and network (formerly with input from the financial consultant) to develop each school's budget using a model designed to achieve self sufficiency of unique requirements of any particular program offered without the use of private philanthropy. The budgets are based on historical actual revenues and expenses and programmatic changes to ensure that the staff can properly support the proposed enrollment.
- The projected five-year renewal budget reflects anticipated stable revenues and expenses associated with planned enrollment as the school continues to serve Kindergarten – 8th grade.
- Bronx Excellence operates the elementary and middle school levels in two adjacent sites purchased through \$23 million in bond financing through Build NYC Resource Corporation. The facilities for the elementary and middle school programs meet the needs of the program for the next charter term.

SUNY RENEWAL BENCHMARK 3B

DOES THE SCHOOL MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

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

- The education corporation Fiscal Policies and Procedures Manual serves as the guide to all financial internal controls and procedures. The manual undergoes ongoing reviews and updates.
- The most recent BCSE audit report completed had no material findings or deficiencies.

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SUNY RENEWAL BENCHMARK 3C

DOES THE SCHOOL COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

Bronx Excellence and the education corporation comply with financial reporting requirements.

- The Institute and NYSED have received the required financial reports on time, complete, and follow generally accepted accounting principles.
- Independent audits of annual financial statements have received unqualified opinions with no advisory or management letter findings to report.
- The school and education corporation generally file key reports timely and accurately including: audit reports, budgets, unaudited quarterly reports of revenue, expenses and enrollment.
- The June 30, 2018 BCSE annual audit reflected continued strong fiscal health of the school and the education corporation.

SUNY RENEWAL BENCHMARK 3D

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

Bronx Excellence and the education corporation have maintained the financial resources to ensure stable operations.

- The school opened in the fall of 2004, the school has reported operating surpluses over the current charter term.
- The education corporation fiscal dashboard in Appendix F reflects fiscally strong with 4.5 months of cash on hand to pay liabilities coming due shortly.
- The education corporation benefits from a combined balance sheet which is a combination of individual schools assets and liabilities. In order to track the operations of any individual school within an education corporation, the Institute tracks each individual school's revenues and expenses in order to report operating surpluses or deficits.
- BCSE had total net assets of approximately \$16.2 million as of the June 30, 2018 and had approximately \$6.3 million in cash on hand.
- As a requirement of charter agreements, BCSE has established the separate bank account for the dissolution fund reserve of the required \$150,000 for the three operating charters as of June 30, 2018.

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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?

The education corporation's plans for the school are reasonable, feasible, and achievable. Bronx Excellence plans to continue to serve students in Kindergarten – 8th grade in the next charter term.

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.

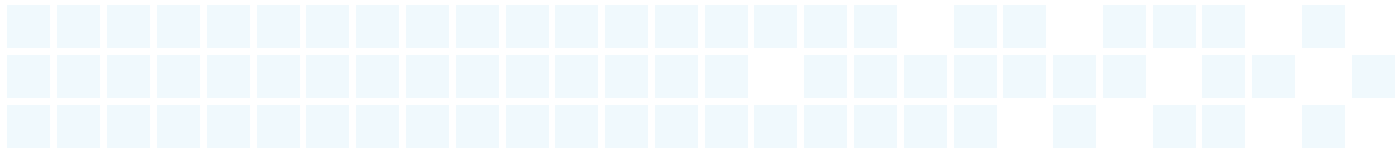
Plans for the Educational Program. Bronx Excellence plans to continue to implement the same core elements of its educational program that enabled the school to meet or come close to meeting its key Accountability Plan goals in the current charter term. Recognizing a slight decline in ELA scores, the school is dispatching curricular and personnel resources to improve its ELA performance. These elements are likely to enable the school to meet or exceed its academic goals in the next charter term. Over the next charter term Bronx Excellence will continue to serve students in Kindergarten – 8th grade with an increase in chartered enrollment of 50 students to align to the school's current actual enrollment.

Plans for Board Oversight & Governance. Current board members express interest in continuing to serve Bronx Excellence in the next charter term. The board intends to add additional members to fill vacancies and new seats during the next charter term.

Fiscal & Facility Plans. Based on evidence collected through the renewal review, including a review of the five-year financial plan, Bronx Charter School for Excellence presents a reasonable and appropriate fiscal plan for the next charter term including education corporation and school budgets that are feasible and achievable. The education corporation intends to maintain its contractual relationship with the network. The Institute has reviewed the proposed terms of such contract and will review and approve the final contract, and any other network contracts, when executed.

	CURRENT	END OF NEXT CHARTER TERM
Enrollment	756	810*
Grade Span	K-8	K-8
Teaching Staff	46	46
Days of Instruction	181	181

*The increase in chartered enrollment reflects an increase to the school's actual enrollment, which current teaching staff number reflects serving.



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Bronx Excellence plans to continue instruction for the elementary and middle school grades in two owned facilities. The current adjacent sites are appropriate for the next charter term and the school plans to continue using their existing spaces.

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.



Bronx
Excellence

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APPENDICES

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EO^E
ED CORP OVERVIEW

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EF^F
ED CORP FISCAL

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APPENDIX A: School Overview

BRONX CHARTER SCHOOL FOR EXCELLENCE BOARD OF TRUSTEES

CHAIR

Kathy Lathen

VICE CHAIR

Joyce Frost

SECRETARY

Mardi Schechter

TRUSTEES

Tanya Pierre

Stacey Lauren

Lena Rumfelt, ex-officio member

SCHOOL LEADERS

PRINCIPAL

Nicole Blair-Barzey, 5-8 Principal (2018-19 to Present)

Florence Bolton, 3-4 Principal (2018-19 to Present)

Maria Saryan, K-2 Principal (2018-19 to Present)

Dawn Dean, Middle Principal (2016-17 to 2017-18)

Adije Okpo, Elementary Principal (2016-17 to 2017-18)

Desiree Hunter, Middle Principal (2015-16)

Kevin Fischer, Middle Principal (2013-14 to 2014-15)

Aleisha Rodriguez, Elementary Principal (2013-14 to 2015-16)

Dr. Charlene Reid, Head of School (2006-07 to 2012-13)

Marc Etienne, Principal (2004-05 to 2005-06)

SCHOOL CHARACTERISTICS

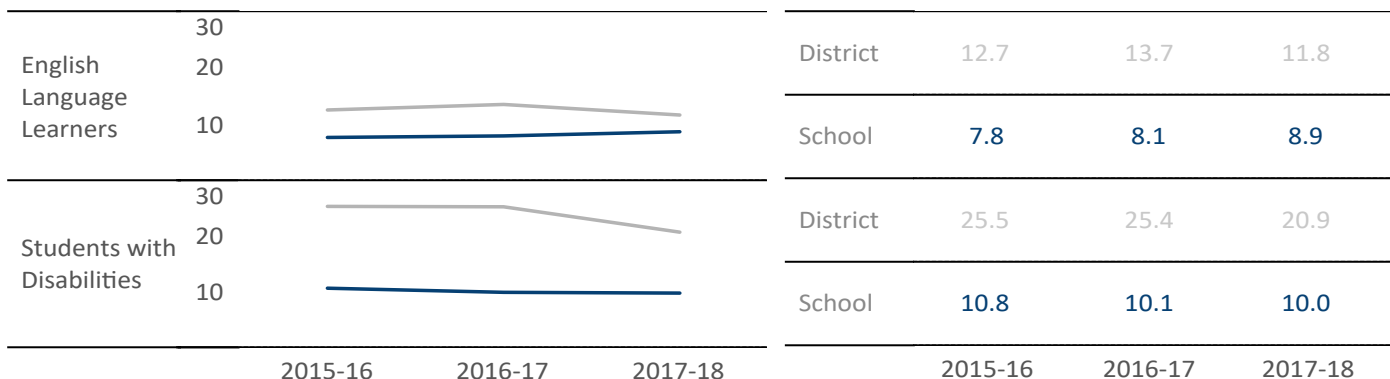
SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	PROPOSED GRADES	ACTUAL GRADES
2014-15	644	635	99	K-8	K-8
2015-16	700	772	110	K-8	K-8
2016-17	728	808	111	K-8	K-8
2017-18	756	805	106	K-8	K-8
2018-19	756	810	107	K-8	K-8

APPENDIX A: School Overview

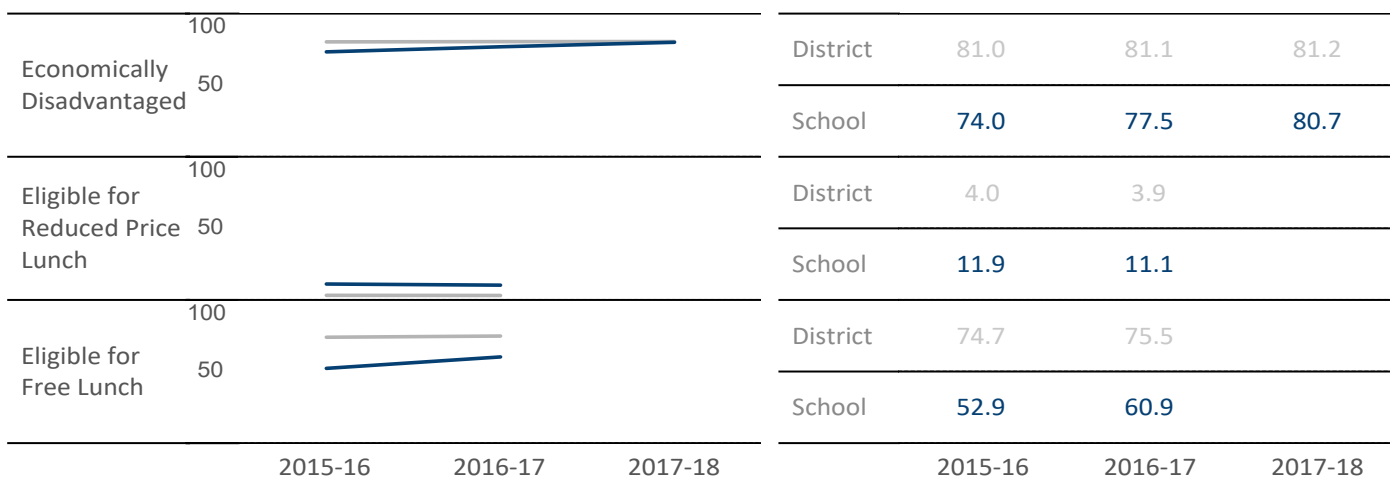
Bronx Charter School for Excellence

Bronx CSD 11

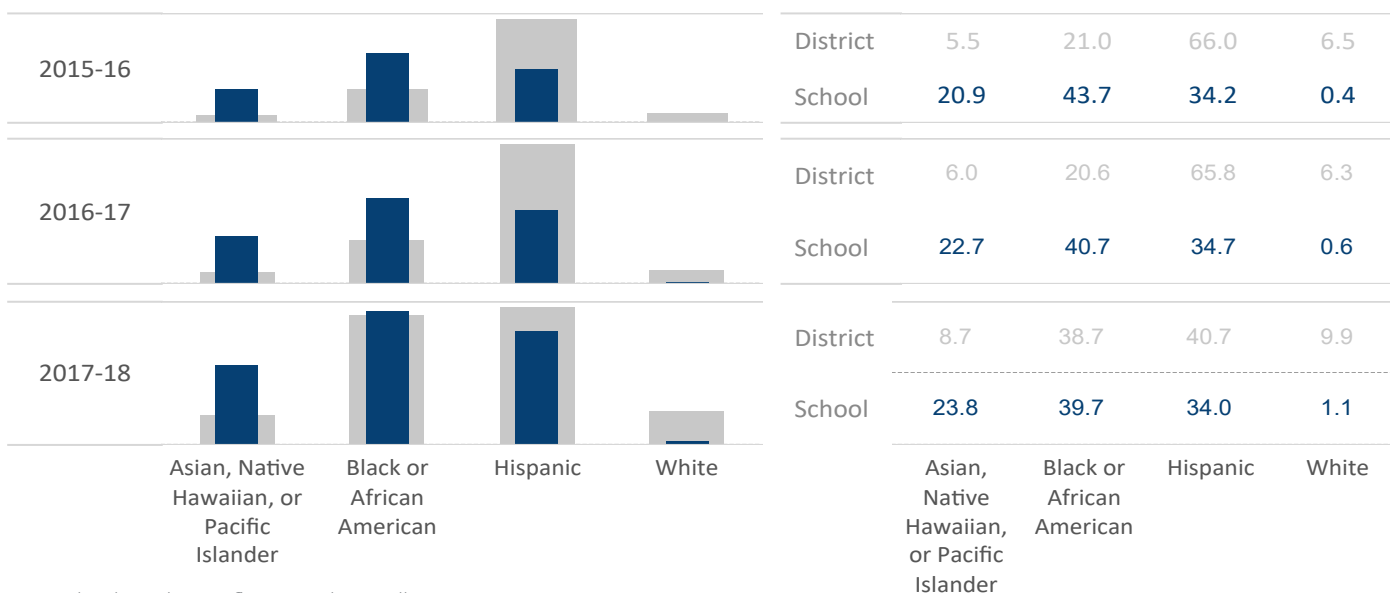
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



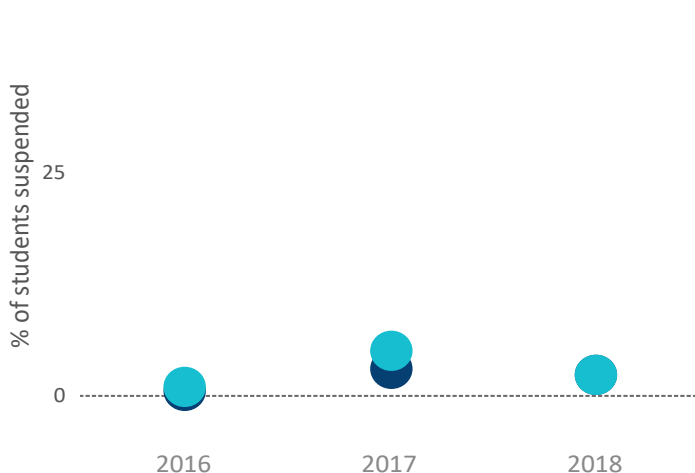
Student Demographics: Race/Ethnicity



APPENDIX A: School Overview

Bronx Charter School for Excellence

Bronx CSD 11



	School ISS Rate	School OSS Rate
2016	1.0	0.5
2017	5.1	3.1
2018	2.4	2.5

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 the 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

2015-16	95.4
2016-17	96.5
2017-18	94.0

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

2016	2017	2018
0	0	3

Bronx Charter School for Excellence's Enrollment and Retention Status: 2017-18

			District Target	School
Enrollment	Economically disadvantaged	<div><div></div></div>	86.0	78.9
	English language learners	<div><div></div></div>	9.4	9.2
	Students with disabilities	<div><div></div></div>	17.2	9.2
Retention	Economically disadvantaged	<div><div></div></div>	92.1	97.8
	English language learners	<div><div></div></div>	91.8	96.8
	Students with disabilities	<div><div></div></div>	92.4	98.4

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 100%	OVERALL SATISFACTION 88%	TRUST 91%	EFFECTIVE SCHOOL LEADERSHIP 88%	STRONG FAMILY COMMUNITY TIES 86%
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TIMELINE OF CHARTER SCHOOL RENEWAL



SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2004-05	First Year Visit	May 25, 2005
2005-06	Evaluation Visit	March 28, 2006
2006-07	Evaluation Visit	May 1-2, 2007
2007-08	Evaluation Visit	February 28, 2008
2008-09	Renewal Visit	December 9-11, 2008
2010-11	Evaluation Visit	December 15-16, 2010
2013-14	Renewal Visit	September 25-26, 2013
2018-19	Renewal Visit	November 7-8, 2018

CONDUCT OF THE RENEWAL VISIT

DATE(S) OF VISIT	EVALUATION TEAM MEMBERS	TITLE
November 7-8, 2018	Andrew Kile	Director of School Evaluation
	Hannah Hansen	School Evaluation Analyst
	Elsa Dure	External Consultant
	Sally Bachofer	External Consultant

APPENDIX A: School Overview

KEY DESIGN ELEMENTS:

ELEMENT	EVIDENT?
High academic standards;	+
A broad liberal arts education;	+
Foundational academic and critical thinking skills that expand to a 21 st century global perspective;	+
Longer school day;	+
Performance-based compensation for staff;	+
Clearly articulated standards for students that encourage holistic growth;	+
School uniforms for students;	+
A commitment to academic performance accountability;	+
A commitment to financial accountability; and,	+
Parent Engagement.	+

APPENDIX B: Performance Summaries

SCHOOL PERFORMANCE SUMMARY: English Language Arts Bronx Charter School for Excellence

	2015-16 Grades Served: K-8				2016-17 Grades Served: K-8				2017-18 Grades Served: K-8				MET
	All Students % (N)		2+ Years Students % (N)		All Students % (N)		2+ Years Students % (N)		All Students % (N)		2+ Years Students % (N)		
	% (N)		% (N)		% (N)		% (N)		% (N)		% (N)		
	Grades		Grades		Grades		Grades		Grades		Grades		
<u>ABSOLUTE MEASURES</u> 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	59.6 (89)	59.8 (82)		3	75.6 (90)	74.7 (87)		3	65.6 (90)	63.4 (82)		NO
	4	73.3 (90)	74.3 (74)		4	50.5 (91)	51.8 (83)		4	68.5 (89)	68.7 (83)		
	5	60.0 (90)	60.8 (79)		5	45.6 (90)	47.3 (74)		5	41.1 (90)	40.0 (85)		
	6	70.8 (89)	74.5 (51)		6	66.7 (90)	69.5 (82)		6	54.4 (90)	55.4 (74)		
	7	57.8 (90)	67.3 (52)		7	71.9 (89)	73.6 (87)		7	61.8 (89)	60.8 (79)		
	8	65.4 (52)	64.7 (51)		8	59.6 (89)	58.6 (87)		8	77.0 (87)	78.8 (85)		
	All	64.4 (500)	66.3 (389)		All	61.6 (539)	63.0 (500)		All	61.3 (535)	61.3 (488)		
	Grades	PLI	AMO		Grades	PLI	AMO		Grades	PI	MIP		
	3-8	160	104	YES	3-8	155	111	YES	3-8	163	101	YES	
	Comparison: Bronx District 11				Comparison: Bronx District 11				Comparison: Bronx District 11				
<u>COMPARATIVE MEASURES</u> 3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Grades	School	District		Grades	School	District		Grades	School	District		YES
	3-8	66.3	28.9	YES	3-8	63.0	32.4	YES	3-8	61.3	37.4	YES	
	Comparison: Bronx District 11				Comparison: Bronx District 11				Comparison: Bronx District 11				
	% ED		Effect Size		% ED		Effect Size		% ED		Effect Size		
	72.8	64.4	30.5	2.07	75.4	61.6	31.6	1.78	78.1	61.3	37.3	1.29	
	YES				YES				YES				
	Economically Disadvantaged students.												
	Grades	School	State		Grades	School	State		Grades	School	State		
	4	68.8			4	48.6			4	42.9			
	5	55.1			5	38.7			5	44.7			
<u>GROWTH MEASURE</u> 5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.	6	66.3			6	59.8			6	45.0			NO
	7	57.1			7	45.6			7	41.8			
	8	60.2			8	49.7			8	50.0			
	All	63.1	50.0	YES	All	48.5	50.0	NO	All	44.8	50.0	NO	
	YES				NO								
	mean growth percentile will meet or exceed the target of 50.												
	Economically Disadvantaged students.												
	% ED		Effect Size		% ED		Effect Size		% ED		Effect Size		
	72.8	64.4	30.5	2.07	75.4	61.6	31.6	1.78	78.1	61.3	37.3	1.29	

APPENDIX B: Performance Summaries

SCHOOL PERFORMANCE SUMMARY: Mathematics

Bronx Charter School for Excellence

	2015-16 Grades Served: K-8				2016-17 Grades Served: K-8				2017-18 Grades Served: K-8				MET
	All Students % (N)		2+ Years Students % (N)		All Students % (N)		2+ Years Students % (N)		All Students % (N)		2+ Years Students % (N)		
	Grades		Grades		Grades		Grades		Grades		Grades		
ABSOLUTE MEASURES 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	75.3 (89)	76.8 (82)		3	70.5 (88)	69.8 (86)		3	72.2 (90)	72.0 (82)		
	4	60.0 (90)	58.1 (74)		4	58.2 (91)	60.2 (83)		4	70.8 (89)	71.1 (83)		
	5	67.4 (89)	66.7 (78)		5	34.4 (90)	32.4 (74)		5	58.9 (90)	58.8 (85)		
	6	92.1 (89)	94.1 (51)		6	74.2 (89)	75.3 (81)		6	57.8 (90)	59.5 (74)		
	7	54.4 (90)	59.6 (52)		7	67.4 (89)	69.0 (87)		7	77.5 (89)	78.5 (79)		
	8	65.4 (52)	64.7 (51)		8	35.2 (88)	36.0 (86)		8	62.1 (87)	63.5 (85)		
	All	69.3 (499)	69.6 (388)	NO	All	56.6 (535)	57.5 (497)	NO	All	66.5 (535)	67.2 (488)	NO	
2. Each year the school's aggregate Performance Level Index on the State exam will meet the Annual Measurable Objective set forth in the State's accountability system.	Grades	PLI	AMO		Grades	PLI	AMO		Grades	PI	MIP		
	3-8	164	101	YES	3-8	144	109	YES	3-8	173	103	YES	
	Comparison: Bronx District 11				Comparison: Bronx District 11				Comparison: Bronx District 11				
COMPARATIVE MEASURES 3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Grades	School	District		Grades	School	District		Grades	School	District		
	3-8	69.6	25.9	YES	3-8	57.5	26.5	YES	3-8	67.2	30.3	YES	
	Comparison: Bronx District 11				Comparison: Bronx District 11				Comparison: Bronx District 11				
4. Each year the school will exceed its predicted percent of students at proficiency on the State exam by at least a small Effect Size (at least 0.3) based on its percentage of Economically Disadvantaged students.	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	
	72.8	69.3	31.1	1.94	75.5	56.6	29.6	1.38	78.1	66.5	34.7	1.56	
	YES				YES				YES				
GROWTH MEASURE 5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.	Grades	School	State		Grades	School	State		Grades	School	State		
	4	61.4			4	45.2			4	52.1			
	5	56.0			5	23.9			5	48.3			
	6	82.8			6	59.8			6	67.5			
	7	51.6			7	43.7			7	54.3			
	8	74.0			8	34.3			8	34.6			
	All	64.4	50.0	YES	All	41.3	50.0	NO	All	51.4	50.0	YES	

APPENDIX C: District Comments

NO COMMENTS RECEIVED

APPENDIX D: Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE

NOTE: Effective 2016-17 the school merged into the education corporation, "Bronx Charter School for Excellence." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.

SCHOOL INFORMATION

BALANCE SHEET

Assets

Current Assets

Cash and Cash Equivalents - **GRAPH 1**
Grants and Contracts Receivable
Accounts Receivable
Prepaid Expenses
Contributions and Other Receivables

Total Current Assets - GRAPH 1

Property, Building and Equipment, net
Other Assets

Total Assets - GRAPH 1

Liabilities and Net Assets

Current Liabilities

Accounts Payable and Accrued Expenses
Accrued Payroll and Benefits
Deferred Revenue
Current Maturities of Long-Term Debt
Short Term Debt - Bonds, Notes Payable
Other

Total Current Liabilities - GRAPH 1

Deferred Rent
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Unrestricted
Temporarily restricted

Total Net Assets

Total Liabilities and Net Assets

ACTIVITIES

Operating Revenue

Resident Student Enrollment
Students with Disabilities

Grants and Contracts

State and local
Federal - Title and IDEA
Federal - Other
Other
NYC DoE Rental Assistance
Food Service/Child Nutrition Program

Total Operating Revenue

Expenses

Regular Education
SPED
Regular Education & SPED (combined)
Other

Total Program Services

Management and General
Fundraising

Total Expenses - GRAPHS 2, 3 & 4

Surplus / (Deficit) From School Operations

Support and Other Revenue

Contributions
Fundraising
Miscellaneous Income
Net assets released from restriction

Total Support and Other Revenue

Total Unrestricted Revenue

Total Temporarily Restricted Revenue

Total Revenue - GRAPHS 2 & 3

Change in Net Assets

Net Assets - Beginning of Year - GRAPH 2

Prior Year Adjustment(s)

Net Assets - End of Year - GRAPH 2

Opened 2004-05

MERGED MERGED

2013-14	2014-15	2015-16	2016-17	2017-18
1,274,427	4,040,679	3,111,119	-	-
583,918	211,365	475,975	-	-
-	-	-	-	-
115,203	145,830	175,919	-	-
-	-	-	-	-
1,973,548	4,397,874	3,763,013	-	-
17,459,719	26,372,964	32,323,697	-	-
13,312,680	5,994,071	3,785,411	-	-
32,745,947	36,764,909	39,872,121	-	-

1,183,004	1,285,168	874,187	-	-
744,022	849,362	999,176	-	-
279,672	359,804	1,803,481	-	-
-	155,000	445,000	-	-
-	-	-	-	-
19,067	1,330,056	744,914	-	-
2,225,765	3,979,390	4,866,758	-	-
27,557,428	27,318,980	26,787,158	-	-
-	-	-	-	-
29,783,193	31,298,370	31,653,916	-	-

2,860,579	5,306,359	8,042,873	-	-
102,175	160,180	175,332	-	-
2,962,754	5,466,539	8,218,205	-	-
32,745,947	36,764,909	39,872,121	-	-

7,472,085	8,829,307	10,866,309	11,675,018	11,939,352
727,850	861,633	1,090,309	902,112	712,990

490,717	284,618	87,560	63,837	63,092
157,067	325,813	424,530	411,507	610,204
-	14,258	105,548	63,976	3,723
-	32,591	-	-	-
-	-	-	-	-
25,836	2,424	6,358	-	472,020
8,873,555	10,350,644	12,580,614	13,116,450	13,801,381

4,993,371	6,310,412	7,287,339	7,130,738	9,472,896
1,173,829	1,374,429	1,510,116	1,190,116	1,462,329
-	-	-	-	-
-	-	-	-	-
6,167,200	7,684,841	8,797,455	8,320,854	10,935,225
1,889,676	1,582,193	1,899,767	1,157,252	698,983
59,417	287,092	86,909	19,169	436
8,116,293	9,554,126	10,784,131	9,497,275	11,634,644

757,262	796,518	1,796,483	3,619,175	2,166,737
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362,019	1,081,036	942,575	10,051	6,752
2,355	551,389	-	41,889	29,000
180,763	74,842	12,608	204,574	24,262
-	-	-	-	-
545,137	1,707,267	955,183	256,514	60,014

9,566,517	11,999,906	13,520,645	13,372,964	13,861,395
(147,825)	58,005	15,152	-	-
9,418,692	12,057,911	13,535,797	13,372,964	13,861,395

1,302,399	2,503,785	2,751,666	3,875,689	2,226,751
1,660,355	2,962,754	5,466,539	7,756,453	11,632,142
-	-	-	-	-
2,962,754	5,466,539	8,218,205	11,632,142	13,858,893

APPENDIX D: Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE

NOTE: Effective 2016-17 the school merged into the education corporation, "Bronx Charter School for Excellence." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2013-14	2014-15	2015-16	2016-17	2017-18
Personnel Service					
Administrative Staff Personnel	387,734	479,488	557,661	189,148	369,528
Instructional Personnel	2,879,312	3,271,118	3,509,767	2,171,473	2,714,148
Non-Instructional Personnel	1,153,774	1,306,869	1,247,144	542,247	721,434
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	4,420,820	5,057,475	5,314,572	2,902,868	3,805,110
Fringe Benefits & Payroll Taxes	1,094,644	1,454,374	1,557,970	836,412	1,118,488
Retirement	107,660	-	-	-	-
Management Company Fees	-	112,653	168,968	1,608,231	1,611,338
Building and Land Rent / Lease	136,496	234,159	234,602	2,385	-
Staff Development	24,029	34,961	45,459	26,499	13,452
Professional Fees, Consultant & Purchased Services	704,448	587,444	560,516	1,137,188	993,138
Marketing / Recruitment	56,144	28,212	24,631	2,387	20,390
Student Supplies, Materials & Services	308,371	433,818	566,875	405,478	345,437
Depreciation	430,233	371,999	375,343	862,947	1,006,632
Other	833,448	1,239,031	1,935,195	1,712,880	2,720,659
Total Expenses	8,116,293	9,554,126	10,784,131	9,497,275	11,634,644

SCHOOL ANALYSIS

ENROLLMENT

	2013-14	2014-15	2015-16	2016-17	2017-18
Original Chartered Enrollment	300	644	700	728	756
Final Chartered Enrollment (includes any revisions)	496	644	700	728	756
Actual Enrollment - GRAPH 4	552	635	772	808	805
Chartered Grades	K-8	K-8	K-8	K-8	K-8
Final Chartered Grades (includes any revisions)	-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2013-14	2014-15	2015-16	2016-17	2017-18
	13,877	13,877	13,877	14,027	14,527
Increase over prior year	2.5%	0.0%	0.0%	1.1%	3.4%

PER STUDENT BREAKDOWN

Revenue	2013-14	2014-15	2015-16	2016-17	2017-18
Operating	16,064	16,296	16,299	16,237	17,152
Other Revenue and Support	987	2,688	1,238	318	75
TOTAL - GRAPH 3	17,051	18,984	17,537	16,554	17,226
Expenses	2013-14	2014-15	2015-16	2016-17	2017-18
Program Services	11,165	12,099	11,398	10,300	13,590
Management and General, Fundraising	3,529	2,943	2,574	1,456	869
TOTAL - GRAPH 3	14,693	15,042	13,972	11,757	14,459
% of Program Services	76.0%	80.4%	81.6%	87.6%	94.0%
% of Management and Other	24.0%	19.6%	18.4%	12.4%	6.0%
% of Revenue Exceeding Expenses - GRAPH 5	16.0%	26.2%	25.5%	40.8%	19.1%

Student to Faculty Ratio

	2013-14	2014-15	2015-16	2016-17	2017-18
	10.2	11.0	11.9	23.1	23.0

Faculty to Admin Ratio

	2013-14	2014-15	2015-16	2016-17	2017-18
	5.4	6.4	7.2	3.9	3.9

Financial Responsibility Composite Scores - GRAPH 6

Score	2013-14	2014-15	2015-16	2016-17	2017-18
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	2.0	2.2	2.3	0.0	0.0
	Fiscally Strong	Fiscally Strong	Fiscally Strong	N/A	N/A

Working Capital - GRAPH 7

	2013-14	2014-15	2015-16	2016-17	2017-18
Net Working Capital	(252,217)	418,484	(1,103,745)	0	0
As % of Unrestricted Revenue	-2.6%	3.5%	-8.2%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.9	1.1	0.8	0.0	0.0
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	HIGH	HIGH	HIGH	N/A	N/A
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	Poor	Poor	Poor	N/A	N/A

Quick (Acid Test) Ratio

	2013-14	2014-15	2015-16	2016-17	2017-18
Score	0.8	1.1	0.7	0.0	0.0
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	HIGH	MEDIUM	HIGH	N/A	N/A
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	Poor	Good	Poor	N/A	N/A

Debt to Asset Ratio - GRAPH 7

	2013-14	2014-15	2015-16	2016-17	2017-18
Score	0.9	0.9	0.8	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	MEDIUM	MEDIUM	MEDIUM	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	Good	Good	Good	N/A	N/A

Months of Cash - GRAPH 8

	2013-14	2014-15	2015-16	2016-17	2017-18
Score	1.9	5.1	3.5	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	MEDIUM	LOW	LOW	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	Good	Excellent	Excellent	N/A	N/A

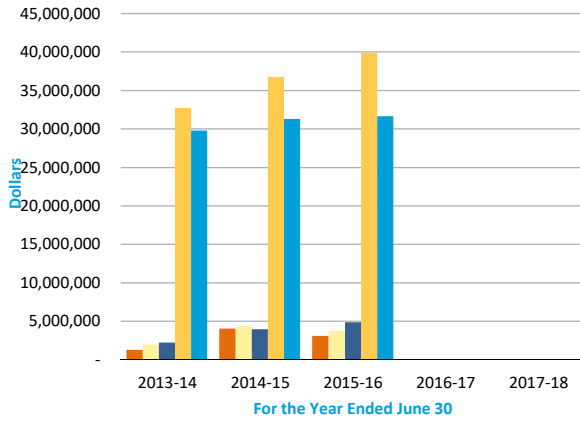
APPENDIX D: Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE

NOTE: Effective 2016-17 the school merged into the education corporation, "Bronx Charter School for Excellence." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.

GRAPH 1

Cash, Assets and Liabilities

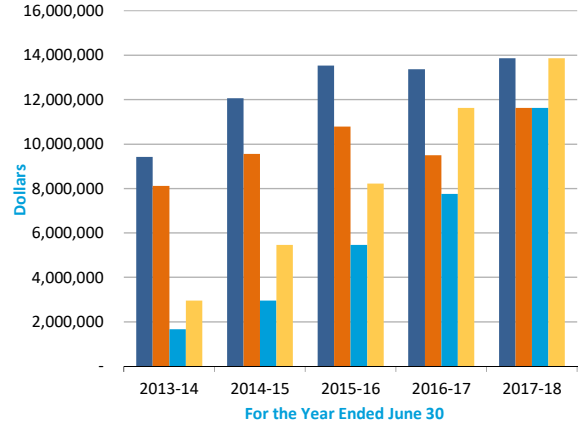


■ Cash ■ Current Assets ■ Current Liabilities ■ Total Assets ■ Total Liabilities

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.

GRAPH 2

Revenue, Expenses and Net Assets

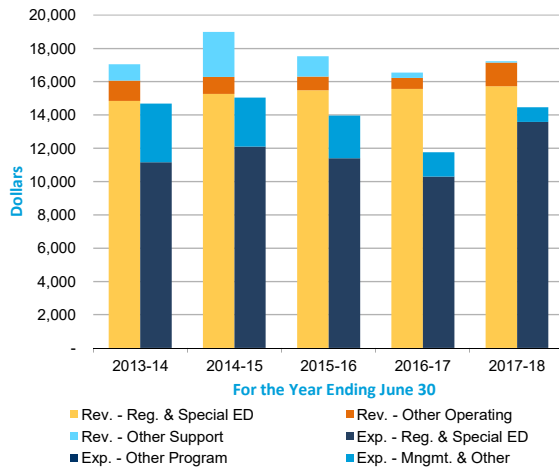


■ Revenue ■ Expenses ■ Net Assets - Beginning ■ Net Assets - Ending

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.

GRAPH 3

Revenue & Expenses Per Pupil

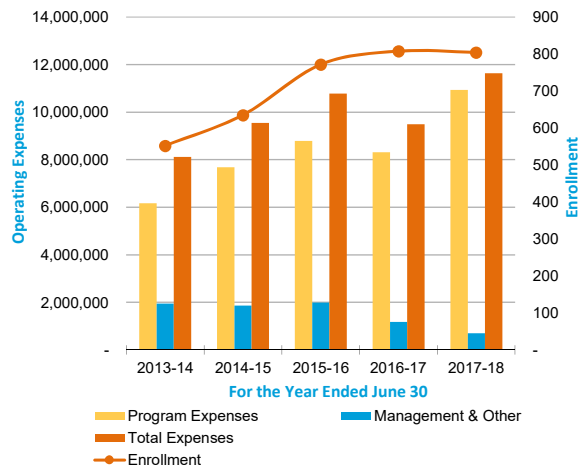


■ Rev. - Reg. & Special ED ■ Rev. - Other Support ■ Exp. - Reg. & Special ED ■ Exp. - Other Program

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.

GRAPH 4

Enrollment vs. Operating Expenses



■ Program Expenses ■ Total Expenses ■ Enrollment

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

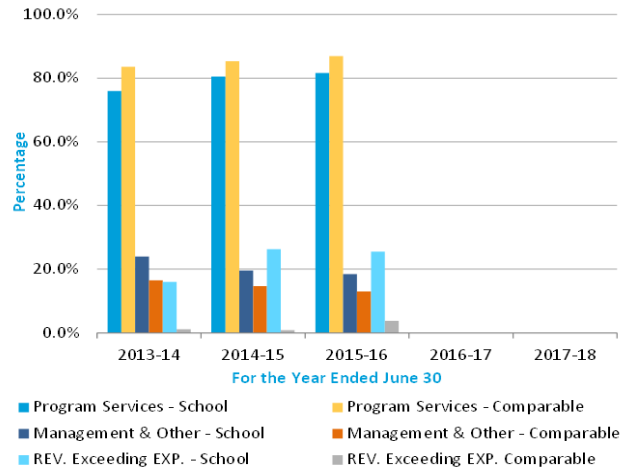
BRONX CHARTER SCHOOL FOR EXCELLENCE

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Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)

GRAPH 5

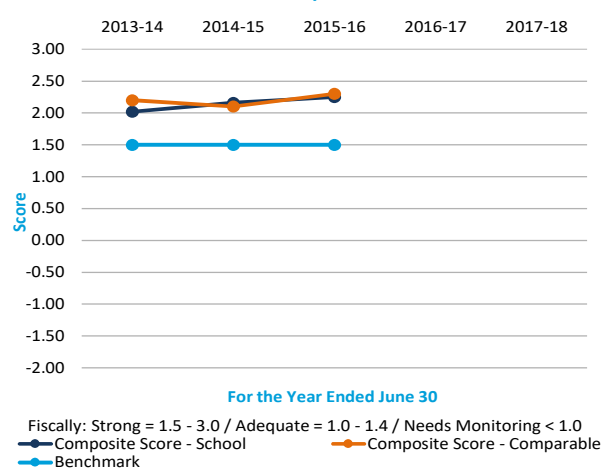
% Breakdown of Expenses



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.

GRAPH 6

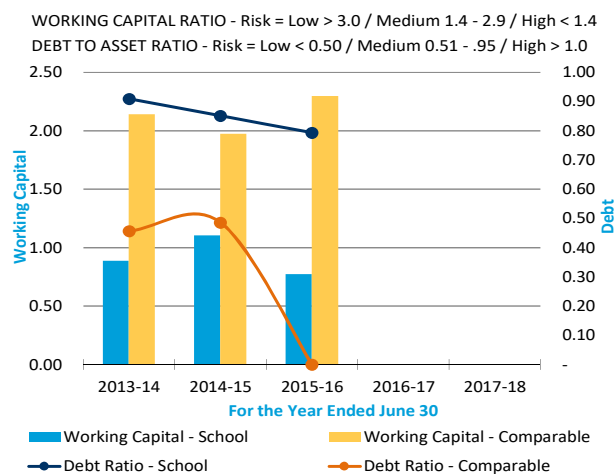
Composite Score



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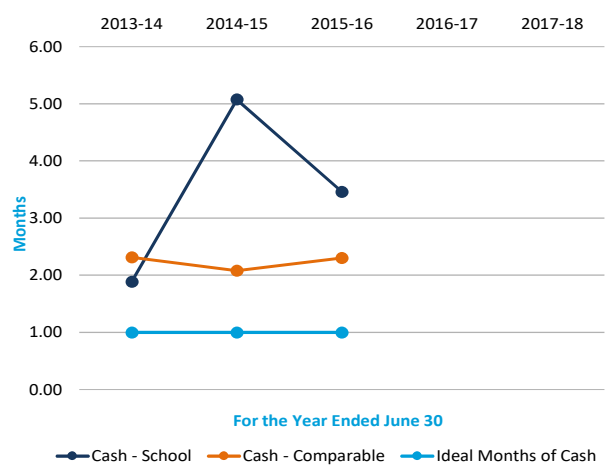
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GRAPH 8

Months of Cash



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APPENDIX E: Education Corporation Overview

EDUCATION CORPORATION TIMELINE OF CHARTER RENEWAL



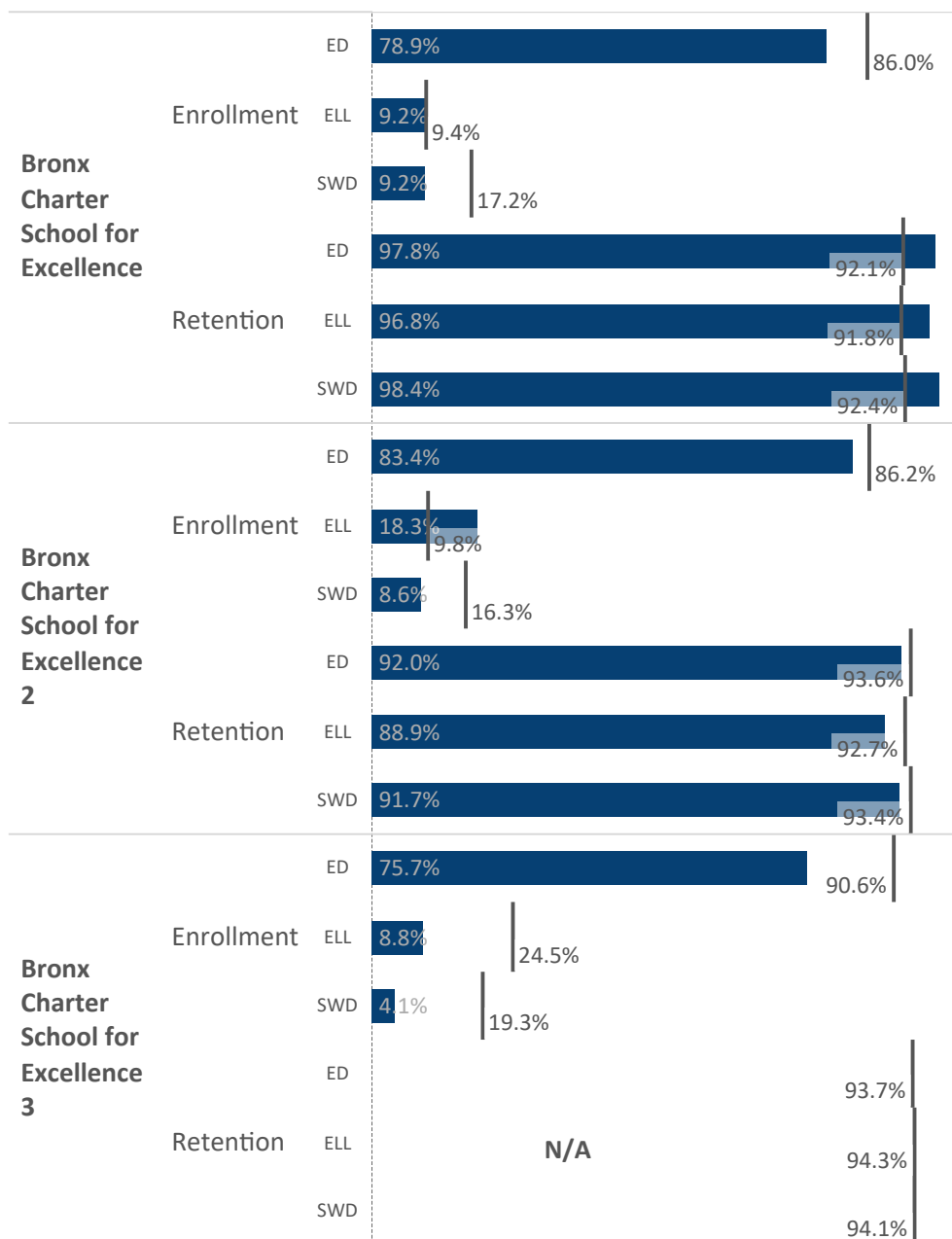
APPENDIX E: Education Corporation Overview

EDUCATION CORPORATION SCHOOL CHARACTERISTICS

School	Local District	Co-located?	Chartered Enrollment	Grade Span
Bronx Charter School for Excellence	CSD 11	No	756	K-8
Bronx Charter School for Excellence 2	CSD 11	No	240	K-3
Bronx Charter School for Excellence 3	CSD 10	No	240	K-2
Bronx Charter School for Excellence 4	CSD 11	No	120	K-1
Bronx Charter School for Excellence 5	CSD 12	Not Open	Not Open	Not Open

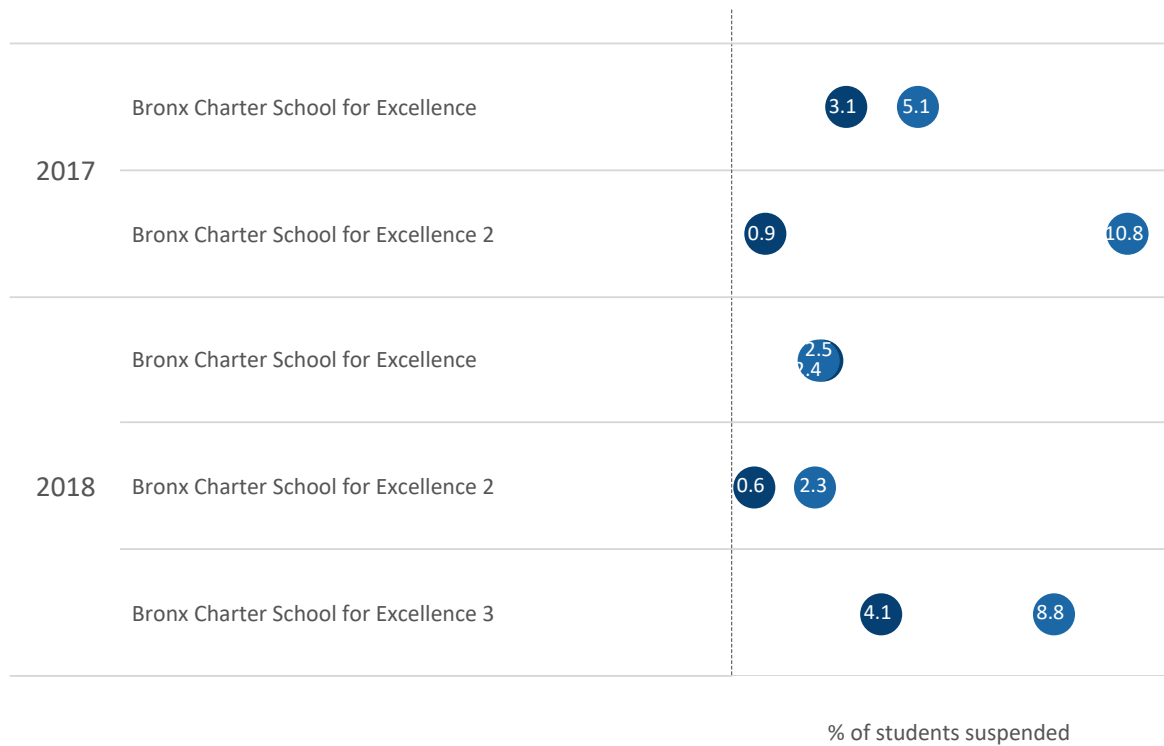
APPENDIX E: Education Corporation Overview

ENROLLMENT AND RETENTION TARGETS



The chart illustrates the **current enrollment and retention percentages** against the **enrollment and retention targets** for each operating school in the education corporation. As required by Education Law § 2851(4)(e), a school must include in its renewal application information regarding the efforts it has, and will, put in place to meet or exceed SUNY's enrollment and retention targets for students with disabilities, ELLs, and FRPL students. This analysis is based on the 2017-18 enrollment and retention data supplied to the Institute by the network.

APPENDIX E: Education Corporation Overview



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

During the school years 2015-16, 2016-17, 2017-18 Bronx Charter School for Excellence Education Corporation schools expelled 3 students.

APPENDIX E: Education Corporation Overview

PERSISTENCE IN ENROLLMENT



APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

SCHOOL INFORMATION

BALANCE SHEET

Assets

Current Assets

Cash and Cash Equivalents - **GRAPH 1**
Grants and Contracts Receivable
Accounts Receivable
Prepaid Expenses
Contributions and Other Receivables

Total Current Assets - **GRAPH 1**

Property, Building and Equipment, net

Other Assets

Total Assets - **GRAPH 1**

Liabilities and Net Assets

Current Liabilities

Accounts Payable and Accrued Expenses
Accrued Payroll and Benefits
Deferred Revenue
Current Maturities of Long-Term Debt
Short Term Debt - Bonds, Notes Payable
Other

Total Current Liabilities - **GRAPH 1**

Deferred Rent

All other L-T debt and notes payable, net current maturities

Total Liabilities - **GRAPH 1**

Net Assets

Unrestricted
Temporarily restricted

Total Net Assets

Total Liabilities and Net Assets

ACTIVITIES

Operating Revenue

Resident Student Enrollment
Students with Disabilities

Grants and Contracts

State and local
Federal - Title and IDEA
Federal - Other
Other
NYC DoE Rental Assistance
Food Service/Child Nutrition Program

Total Operating Revenue

Expenses

Regular Education
SPED
Regular Education & SPED (combined)
Other

Total Program Services

Management and General
Fundraising

Total Expenses - **GRAPHS 2, 3 & 4**

Surplus / (Deficit) From School Operations

Support and Other Revenue

Contributions
Fundraising
Miscellaneous Income
Net assets released from restriction

Total Support and Other Revenue

Total Unrestricted Revenue

Total Temporarily Restricted Revenue

Total Revenue - **GRAPHS 2 & 3**

Change in Net Assets

Net Assets - Beginning of Year - **GRAPH 2**

Prior Year Adjustment(s)

Net Assets - End of Year - **GRAPH 2**

	MERGED			MERGED
	2013-14	2014-15	2015-16	2016-17
	-	-	-	4,158,737
	-	-	-	537,248
	-	-	-	40,781
	-	-	-	83,619
	-	-	-	-
	-	-	-	282,337
	-	-	-	4,820,385
	-	-	-	33,122,435
	-	-	-	2,572,520
	-	-	-	40,515,340
	-	-	-	1,225,560
	-	-	-	487,364
	-	-	-	4,061
	-	-	-	-
	-	-	-	-
	-	-	-	1,429,782
	-	-	-	3,146,767
	-	-	-	-
	-	-	-	552,578
	-	-	-	24,567,596
	-	-	-	3,146,767
	-	-	-	12,177,403
	-	-	-	-
	-	-	-	12,177,403
	-	-	-	15,324,170
	-	-	-	13,373,465
	-	-	-	1,013,401
	-	-	-	262,412
	-	-	-	468,772
	-	-	-	159,571
	-	-	-	-
	-	-	-	1,150,953
	-	-	-	473,517
	-	-	-	15,277,621
	-	-	-	8,365,301
	-	-	-	1,366,121
	-	-	-	-
	-	-	-	-
	-	-	-	9,731,422
	-	-	-	1,366,280
	-	-	-	24,066
	-	-	-	11,121,768
	-	-	-	4,155,853
	-	-	-	10,051
	-	-	-	41,889
	-	-	-	214,343
	-	-	-	-
	-	-	-	266,283
	-	-	-	15,543,904
	-	-	-	-
	-	-	-	15,543,904
	-	-	-	4,422,136
	-	-	-	7,756,453
	-	-	-	-
	-	-	-	12,178,589

APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

Personnel Service
Administrative Staff Personnel
Instructional Personnel
Non-Instructional Personnel
Personnel Services (Combined)
Total Salaries and Staff
Fringe Benefits & Payroll Taxes
Retirement
Management Company Fees
Building and Land Rent / Lease
Staff Development
Professional Fees, Consultant & Purchased Services
Marketing / Recruitment
Student Supplies, Materials & Services
Depreciation
Other

2013-14	2014-15	2015-16	2016-17	2017-18
-	-	-	241,094	621,709
-	-	-	2,501,875	3,747,075
-	-	-	675,178	1,083,247
-	-	-	-	-
-	-	-	3,418,147	5,452,031
-	-	-	960,456	1,443,344
-	-	-	-	-
-	-	-	1,834,483	2,244,243
-	-	-	316,254	1,391,727
-	-	-	26,993	14,100
-	-	-	1,306,933	1,554,792
-	-	-	9,536	22,519
-	-	-	553,687	619,162
-	-	-	862,947	1,015,524
-	-	-	1,832,331	3,123,444
-	-	-	11,121,767	16,880,886

Total Expenses

SCHOOL ANALYSIS

ENROLLMENT

Original Chartered Enrollment
Final Chartered Enrollment (includes any revisions)
Actual Enrollment - GRAPH 4
Chartered Grades
Final Chartered Grades (includes any revisions)

2013-14	2014-15	2015-16	2016-17	2017-18
-	-	-	848	1,056
-	-	-	848	1,086
-	-	-	926	1,131
-	-	-	-	-
-	-	-	-	-

Primary School District:

Per Pupil Funding (Weighted Avg of All Districts)
Increase over prior year

-	-	-	-	-
0.0%	0.0%	0.0%	0.0%	0.0%

PER STUDENT BREAKDOWN

Revenue

Operating
Other Revenue and Support
TOTAL - GRAPH 3

-	-	-	16,504	18,469
-	-	-	288	58
-	-	-	16,792	18,528

Expenses

Program Services
Management and General, Fundraising
TOTAL - GRAPH 3
% of Program Services
% of Management and Other
% of Revenue Exceeding Expenses - GRAPH 5

-	-	-	10,513	14,052
-	-	-	1,502	880
-	-	-	12,015	14,932
0.0%	0.0%	0.0%	87.5%	94.1%
0.0%	0.0%	0.0%	12.5%	5.9%
0.0%	0.0%	0.0%	39.8%	24.1%

Student to Faculty Ratio

-	-	-	21.5	19.8
---	---	---	------	------

Faculty to Admin Ratio

-	-	-	3.9	4.4
---	---	---	-----	-----

Financial Responsibility Composite Scores - GRAPH 6

Score
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 /
Fiscally Needs Monitoring < 1.0

0.0	0.0	0.0	2.5	2.7
N/A	N/A	N/A	Fiscally Strong	Fiscally Strong

Working Capital - GRAPH 7

Net Working Capital
As % of Unrestricted Revenue
Working Capital (Current) Ratio Score
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)

0	0	0	1,673,618	5,376,517
0.0%	0.0%	0.0%	10.8%	25.7%
0.0	0.0	0.0	1.5	2.9
N/A	N/A	N/A	MEDIUM	MEDIUM
N/A	N/A	N/A	Good	Good

Quick (Acid Test) Ratio

Score
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)

0.0	0.0	0.0	1.5	2.8
N/A	N/A	N/A	MEDIUM	LOW
N/A	N/A	N/A	Good	Excellent

Debt to Asset Ratio - GRAPH 7

Score
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)

0.0	0.0	0.0	0.1	0.6
N/A	N/A	N/A	LOW	MEDIUM
N/A	N/A	N/A	Excellent	Good

Months of Cash - GRAPH 8

Score
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)

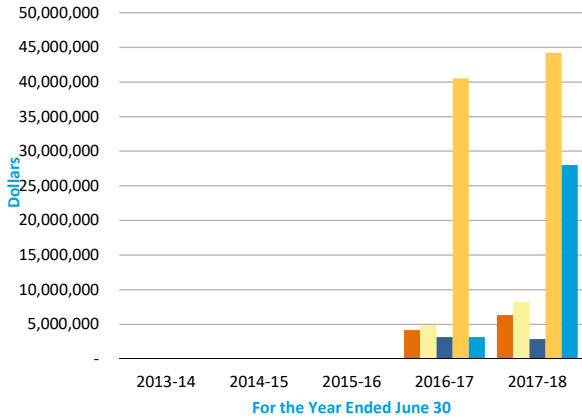
0.0	0.0	0.0	4.5	4.5
N/A	N/A	N/A	LOW	LOW
N/A	N/A	N/A	Excellent	Excellent

APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

GRAPH 1

Cash, Assets and Liabilities

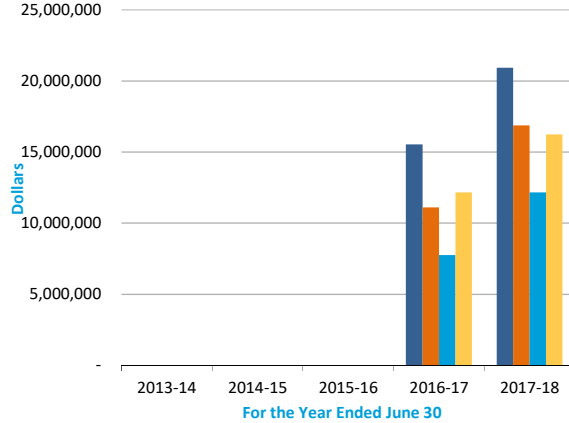


■ Cash ■ Current Assets ■ Current Liabilities ■ Total Assets ■ Total Liabilities

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.

GRAPH 2

Revenue, Expenses and Net Assets

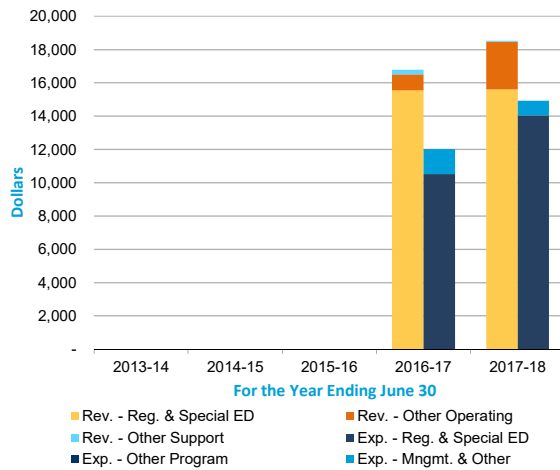


■ Revenue ■ Expenses ■ Net Assets - Beginning ■ Net Assets - Ending

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.

GRAPH 3

Revenue & Expenses Per Pupil

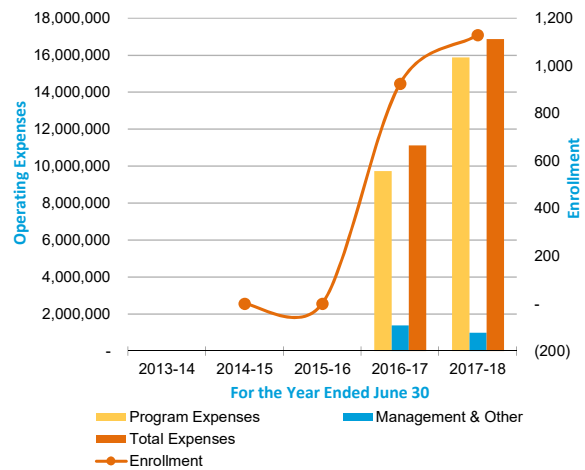


■ Rev. - Reg. & Special ED ■ Rev. - Other Support ■ Rev. - Other Program ■ Exp. - Reg. & Special ED ■ Exp. - Mngmt. & Other ■ Exp. - Other Program

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.

GRAPH 4

Enrollment vs. Operating Expenses



■ Program Expenses ■ Management & Other ■ Total Expenses ● Enrollment

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.

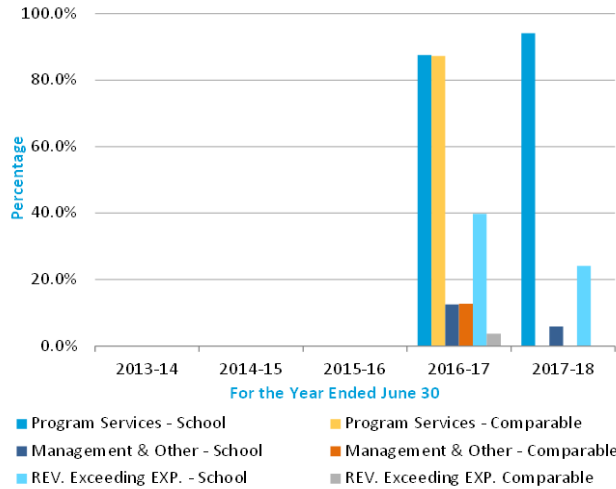
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BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)

GRAPH 5

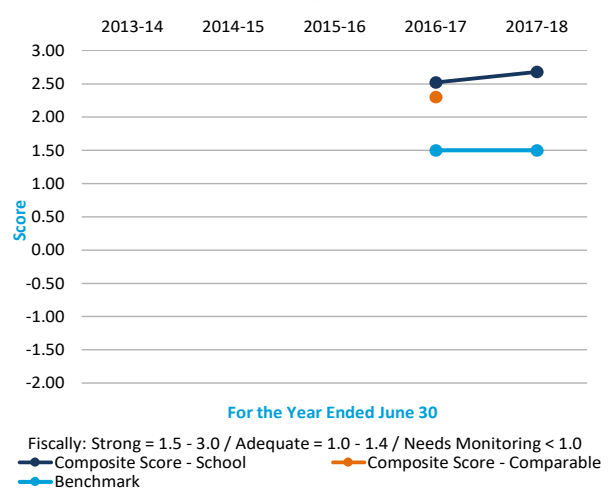
% Breakdown of Expenses



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.

GRAPH 6

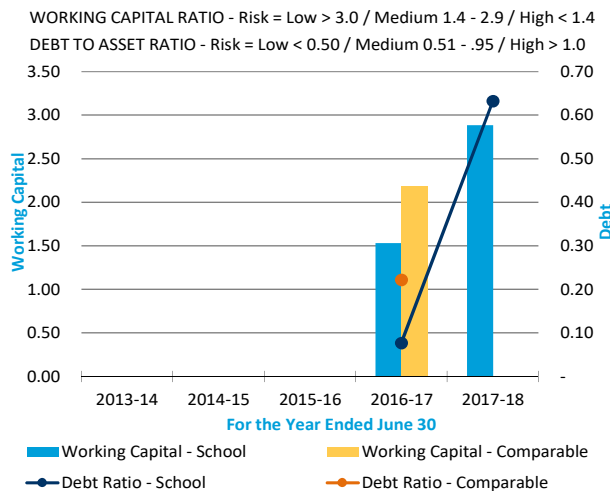
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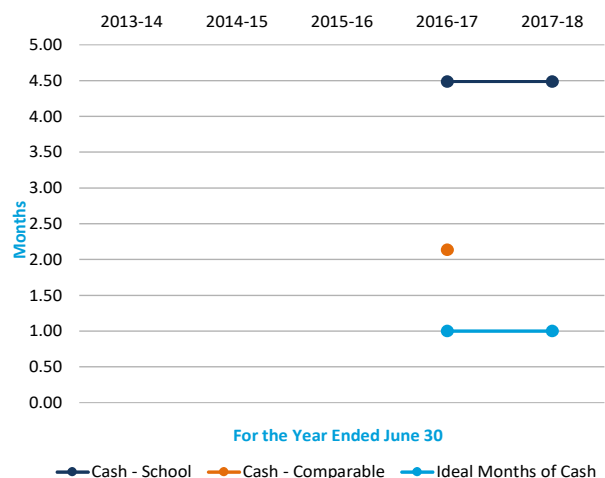
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