

THE SUNY CHARTER SCHOOLS INSTITUTE

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

*SUCCESS ACADEMY CHARTER SCHOOL-
BED STUY 3*

*SUCCESS ACADEMY CHARTER SCHOOL-
BRONX 3*

*SUCCESS ACADEMY CHARTER SCHOOL-
HARLEM 1*

*SUCCESS ACADEMY CHARTER SCHOOL-
HARLEM 6*

*SUCCESS ACADEMY CHARTER SCHOOL-
HUDSON YARDS*

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CONTENTS

2

Introduction & Report Format

5

Renewal Recommendation

9

Education Corporation Background and Executive Summary

15

Academic Performance

38

Organizational Performance

45

Fiscal Performance

49

School Overview

Appendices

A: Education Corporation Overview

B: Education Corporation Fiscal Dashboard

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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 the education corporation’s Applications for Charter Renewal for all schools under renewal consideration during the current school year, and more broadly, details the merits of the schools’ cases 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



Based on these elements, the Institute is confident in the education corporation's capacity to ensure that each school within the education corporation, and especially the charter schools under renewal consideration during this school year, continues to produce high student achievement results.

This renewal report presents the evidence for and merits of the renewal recommendations for five schools operating under a single education corporation. The evidence supporting the renewal recommendation for each school is presented under a single cover when multiple schools operate under one education corporation and the academic program at each school is substantively the

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

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same both in design and in implementation. Most importantly, the Institute presents the evidence for multiple schools under a single cover when the academic program at each school has produced a track record of meeting or coming close to meeting the academic goals in each school's Accountability Plan. The Institute uses multiple measures to determine the education corporation demonstrates capacity throughout the charter term to support its schools in meeting or coming close to meeting their Accountability Plan goals and that it is likely to do so in a subsequent charter term.

REPORT FORMAT

For a high performing education corporation, the 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. For the purposes of multiple schools within the education corporation under renewal consideration at the same time, the Institute slightly modifies the questions below to reflect the capacity of the education corporation and the supports it provides to its schools. The Institute uses the four interconnected renewal questions below for framing benchmark statements to determine if an education corporation has made an adequate case for renewal for each of its schools.



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

Because the education corporation implements a replicated program across all of its sites, and that program posts an overall record of high academic performance, the Institute confirms that each school under renewal consideration implements the replicated program through classroom observations, interviews, and document reviews. For schools under renewal consideration, the

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

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Institute completes compliance related checks and meets with school leaders, teachers, and families. The Institute also meets with members of the education corporation board of trustees within the charter term.

In this report, information about the education corporation and the academic program found across all its schools precedes information regarding each individual renewal school, which includes student performance information, copies of any school district comments on the Applications for Charter Renewal, and the SUNY Fiscal Dashboard information for each school. The appendices that follow offer statistical information on each school in the education corporation and the SUNY Fiscal Dashboard information for the education corporation.



RENEWAL RECOMMENDATION

Full-Term Renewal. The Institute recommends that the SUNY Trustees approve the five Applications for Charter Renewal:

- Success Academy Charter School – BedStuy 3;
- Success Academy Charter School – Bronx 3;
- Success Academy Charter School – Harlem 1;
- Success Academy Charter School – Harlem 6; and,
- Success Academy Charter School – Hudson Yards.

If each school is renewed, Success Academy Charter Schools – NYC will be granted the authority to continue to operate each school for a period of five years with authority to provide instruction to students in such configurations as set forth in each school’s Application for Charter Renewal. The table below presents more information about the schools.

SCHOOL	PROJECTED GRADES FOR END OF NEXT CHARTER TERM	PROJECTED ENROLLMENT FOR END OF NEXT CHARTER TERM	RENEWAL TYPE
Success Academy Charter School – Bed Stuy 3 (“Success BedStuy 3”)	5-8	444	Five-Year Initial
Success Academy Charter School – Bronx 3 (“Success Bronx 3”)	K-12	2,148	Five-Year Subsequent
Success Academy Charter School – Harlem 1 (“Success Harlem 1”)	K-12	1,938	Five-Year Subsequent
Success Academy Charter School – Harlem 6 (“Success Harlem 6”)	K-8	727	Five-Year Initial
Success Academy Charter School – Hudson Yards (“Success Academy Hudson Yards”)	K-4	367	Five-Year Initial

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To earn an **Initial Full-Term Renewal**, a school must either:



have compiled a strong and compelling record of meeting or coming close to meeting its academic Accountability Plan goals, and have in place at the time of the renewal review an educational program that, as assessed using the Qualitative Education Benchmarks,³ is generally effective; or,



have made progress toward meeting its academic Accountability Plan goals and have in place at the time of the renewal review an education program that, as assessed using the Qualitative Education Benchmarks, is particularly strong and effective.⁴

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.⁵

REQUIRED FINDINGS

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

- 1: each 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 each school in an educationally and fiscally sound manner in the next charter term; and,
- 3: given the programs they will offer, their structure and purpose, approving each school to operate for another five years is likely to improve student learning and achievement and materially further the purposes of the Act.⁶

METHODOLOGY

By March 16, 2020, schools across New York State transitioned to Continuity of Learning Plans to provide remote instruction to students following Governor Cuomo's executive orders, which closed schools to in person instruction in response to the COVID-19 pandemic. At the start of the facility closure period, the Institute continued oversight of programs and gathered Continuity of Learning Plans from every school and had ongoing communication to support and monitor programs. Success Academy Charter Schools – New York City ("SACS-NYC" or

3. The Qualitative Education Benchmarks are a subset of the SUNY Renewal Benchmarks.

4. SUNY Renewal Policies (p. 12).

5. SUNY Renewal Policies (p.14).

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

the “education corporation”) transitioned to its Continuity of Learning Plan in that time frame. During summer 2020, the Governor and New York State Department of Health requested that all schools submit a Reopening Plan following specific health and safety guidelines. The Institute additionally requested SUNY authorized charter schools submit specific information regarding the structure of the school’s educational program for the 2020-21 school year. A brief summary of the education corporation’s current program is outlined in the Education Corporation Background section.

The Institute followed its typical procedures where possible. Schools submitted the Application for Charter Renewal in August and included additional information regarding the Continuity of Learning Plans. The Institute analyzed the schools’ programs using the SUNY Renewal Benchmarks.

The Institute team conducted its visit activities virtually. The Institute’s specific evaluative treatment for each school is outlined in the Education Corporation Background section. In considering how to evaluate schools’ remote or hybrid learning plans, the Institute reviewed research and standards for remote and online teaching. Utilizing the National Standards for Quality Online Teaching (“NSQOT”),⁷ the Institute conducted a review of the SUNY Trustees’ Renewal Benchmarks with the standards and found that the Renewal Benchmarks and the National Standards for Quality Online Teaching align closely. In the qualitative review narrative found within this report, the visit team collected evidence of the quality of each school’s hybrid or remote learning model. In some instances, the Institute adjusted its indicators to reflect standards for online learning, where applicable.

ENROLLMENT AND RETENTION TARGETS

Enrollment and retention targets apply to all open and operating charter schools. The Act requires charter schools to make good faith efforts to meet enrollment and retention targets for students with disabilities, English language learners (“ELLs”), and students who are eligible applicants for the federal Free and Reduced Price Lunch (“FRPL”) program.

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.

SACS-NYC makes good faith efforts to meet its enrollment and retention targets. SACS-NYC contracts with the not-for-profit charter management organization (“CMO”) Success Academy Charter Schools, Inc. (“Success Academy” or the “network”) for, among other things, support

7. NSQOT is a set of standards for online teaching established by a group of online education institutions. For more information, see www.nsqol.org.

with monitoring the enrollment and retention targets of the schools within SACS-NYC. Specific enrollment and retention information is reported for each individual school in the School Overview sections and for all SACS-NYC schools in Appendix A. Overall, the network makes efforts to increase schools' enrollment of students in these categories. Network leaders plan to continue using the following strategies to meet targets in the next charter term:

- distributing targeted mailings to residents of each school's New York City Community School District ("CSD") in low income housing and in mixed income housing in district communities;
- advertising materials using languages other than English to target ELLs within the CSD as determined by each school;
- implementing a lottery preference for ELLs in its admission policies;
- hosting open houses and informational sessions for prospective families;
- recruiting at local pre-school and pre-Kindergarten programs that serve students with disabilities; and,
- providing advertisements, flyers, and marketing materials in local newspapers, supermarkets, community centers, and apartment complexes.

For additional information on each school's enrollment and retention target progress, see the School Overviews, below.

CONSIDERATION OF SCHOOL DISTRICT COMMENTS

In accordance with the Act, the Institute notified the district in which the charter schools are located regarding the schools' Applications for Charter Renewal. Any full text of written comments, if available, received from the district appears in Appendix C.

As of the date of this report, the Institute has not received district comments for Success BedStuy 3, Success Bronx 3, Success Harlem 1, Success Harlem 6, or Success Hudson Yards. A summary of public comments submitted to the Institute appears in the School Overview sections below.

EDUCATION CORPORATION BACKGROUND AND EXECUTIVE SUMMARY

SUCCESS ACADEMY CHARTER SCHOOLS – NYC

This section of the report provides an overall description of the highly successful model and aggregate analysis of SACS-NYC student achievement results. A detailed, school by school analysis highlighting individual school background, student performance, legal compliance, and fiscal information, is presented in the School Overview sections.

BACKGROUND

SACS-NYC, a not-for-profit charter school education corporation, is currently authorized to operate 38 charter schools. Thirty-one of these schools are currently open. The New York State Board of Regents approved the first Success school in January 2006, which thereafter merged over under SUNY authorization. Since that time, SUNY has approved the education corporation to replicate its program and has granted it 37 additional charters, all of which are under SUNY authorization. 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.

SACS-NYC’s mission is:



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

SACS-NYC Schools seek to provide this exceptionally high quality education to all of their students, including English language learners and students with special education needs, irrespective of socioeconomic, racial, ethnic, and/or other status.

Success Academy, a Delaware not-for-profit CMO based in New York City, serves the 38 schools operated by SACS-NYC. By contract, Success Academy provides all schools with academic, operational, finance, legal, and back office assistance. Schools utilize the network’s curriculum and assessment materials, all of which the network curriculum teams purchase and/or design. The network is also responsible for managing and evaluating the performance of each school and school leader with network managing directors serving in supervisory roles for principals. Each SACS-NYC school implements an academic program consistent with all other SACS-NYC schools, all of which are high performing.

COVID-19 RESPONSE

SACS-NYC transitioned its operating schools and approximately 17,600 students and families to remote learning on March 16, 2020. Network leaders worked closely with school leaders and teachers to quickly establish a Continuity of Learning Plan that focused on replicating the rigorous SACS-NYC instructional model in a remote learning format. To ensure that all students had functioning technology necessary to access the educational program, SACS-NYC and the network took on a massive effort working closely with various New York City stakeholders to distribute over 10,000 devices to students in a wide range of living situations. The network and SACS-NYC mailed home and delivered math manipulative kits and science experiment kits to enhance the continuity of learning students experienced in those subjects. As a result of the network's swift, coordinated, and comprehensive response to Governor Cuomo's executive order to close school facilities, students in 4th – 12th grade immediately began synchronous learning for the entire school day. For Kindergarten – 3rd grade, SACS-NYC immediately implemented its plan to focus on building reading skills for students while teachers conducted one on one calls and sessions with students to support this effort.

SACS-NYC originally designed a hybrid reopening plan for the 2020-21 school year with grade levels staggering in person learning at least two and a half days per week. Due to uncertainties of access in the New York City Department of Education ("NYCDOE") co-located spaces and infection rates within New York City, SACS-NYC made the decision to remain in remote learning through December 2020 to allow for continuity of learning for students.

Through Success Academies' Education Institute and The Robertson Center at Success Academies, SACS-NYC and the network continues distributing high quality professional development experiences for educators transitioning to remote learning. Educators across the country take advantage of various professional learning sessions on promising practices for the effective delivery of remote instruction and maintaining social and emotional health free of charge.

Each of the schools up for renewal consideration implement the SACS-NYC remote instructional model with a high degree of fidelity providing rigorous learning opportunities to students in a remote, synchronous format. In considering feedback from leaders, teachers, students, and families, the schools adjusted aspects of its programming to ensure sustainability and high expectations for learning, such as adjusting its daily schedule. The

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schools continue to conduct a full synchronous schedule. The schools also continue to offer elective courses, called “scholar talent,” to ensure that students have opportunities to interact with one another in social settings. In addition to their high quality teaching and learning, schools also began offering an intervention block at the end of each day to provide targeted instruction for students to support in closing learning gaps.

At the time of the Institute’s renewal review of Success BedSuy 3, Success Bronx 3, Success Harlem 1, Success Harlem 6, and Success Hudson Yards, all schools in the education corporation remained in a fully remote model.

The New York Forward Department of Health Reopening Plan for SACS-NYC, developed in alignment with guidance from the New York State Department of Health, can be found [at this link](#).

EDUCATION CORPORATION BACKGROUND AND EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Success Bronx 3 and Success Harlem 1 are academic successes having met their Accountability Plan goals over the charter term and demonstrates high levels of performance. While Success BedStuy 3, Success Harlem 6, and Success Hudson Yards have not yet produced student state test data, the Institute analyzed student achievement data from interim assessments that reflect similar academic program strength found at other SACS-NYC schools. Success Bronx 3 and Success Harlem 1 demonstrate strong student achievement in the following ways:

- Success Harlem 1 enrolled four-year high school Graduation Cohorts in the final three years of its Accountability Period and posted graduation rates that exceeded the absolute target and district comparison in all years in which data are available.
- Success Harlem 1 demonstrated superlative college preparation over the charter term with 100% of all three graduating classes matriculating into college the year following graduation from 2017-18 through 2019-20.
- The school consistently posted high achievement in English language arts (“ELA”) and mathematics. The school’s 3rd – 8th grades outperformed 97% of schools in ELA and 99% of schools in mathematics across the state in 2018-19 as measured by the state’s ELA and mathematics exams, respectively. Additionally, the school outperformed the district and demographically similar schools every year of the charter term.
- Success Harlem 1 demonstrated strong science achievement over the term. Each year, 100% of students scored at or above proficiency on the state’s science exam, far exceeding the absolute target and the district performance.
- The school posted a record of high achievement for at-risk populations, specifically students with disabilities and ELLs. In 2018-19, both subgroups far outperformed their district peers in ELA and mathematics. Notably, 87% of the school’s students with disabilities scored at or above proficiency in mathematics that year, surpassing the absolute target for all students by 12 percentage points.
- Success Bronx 3 consistently posted high ELA and mathematics achievement. In 2018-19, the school outperformed 97% of schools in ELA and 98% of schools in mathematics across the state as measured by the state’s ELA and mathematics exams. The school also performed higher than the district and schools enrolling similar proportions of economically disadvantaged students every year.
- Success Bronx 3 also posted a record of strong science results. The school surpassed the absolute and comparative target in every year with testing results. In 2018-19, 100% of students scored at or above proficiency and 99% of students scored at level 4, the highest possible level.

- Success Bronx 3 also demonstrated high achievement for at-risk populations, especially students with disabilities. In 2018-19, the school's students with disabilities outperformed their district counterparts in ELA and mathematics.
- In 2017-18, the network launched the Success Academy Education Institute and began sharing its high quality curricular and training materials as open source materials online. Shortly thereafter, the network opened the Robertson Center at 500 West 41st Street, New York, NY, that offers free professional development and education focused events to educators across the nation.
- In 2018-19, SACS-NYC initiated a new observation tool with Torsh TALENT, a software that video records teachers and an accompanying online platform that allows leaders and peers to comment in real time on teachers' performance. The platform archives feedback over time so leaders and teachers can easily access historical feedback to track the progression of each teacher's development.

Success BedStuy 3 did not produce student achievement results during the initial charter term. Early in the charter term, the school enrolled students in Kindergarten – 2nd grades and not in testing grades. Success BedStuy 3 did not operate during 2018-19 due to facility space constraints imposed by the NYCDOE. The school reopened to 5th and 6th grade students in 2019-20. However, the Institute's renewal visit to Success BedStuy 3 confirmed that the school implements the same effective program found at other SACS-NYC schools, which results in all schools in the education corporation meeting their Accountability Plan goals. More detail on the Institute's observation of Success BedStuy 3's high quality program is found in the School Overview section.

Success Harlem 6 enrolled students in testing grades for the first time in 2019-20, and, due to the Board of Regents' cancelling of the 3rd – 8th grade testing in ELA and mathematics, did not produce student achievement results. After a review of the school's program, the Institute finds the school implements the same effective elements of the SACS-NYC academic program that allows all schools within the education corporation to meet their Accountability Plan goals. In the absence of the New York State exams for students in 3rd – 8th grade in 2019-20, the school administered the Fountas and Pinnell Benchmark Assessment System ("F&P") reading assessment to monitor progress of its Kindergarten – 3rd grade students in reading at the end of the year. That year, 89% of students met or exceeded expectations on the F&P.

Success Hudson Yards enrolled students in testing grades for the first time in 2019-20, and, due to the Board of Regents' cancelling of the 3rd – 8th grade testing in ELA and mathematics, did not produce student achievement results. After a review of the school's program, the Institute finds that the school implements the same effective elements of the SACS-NYC academic program that allows all schools within the education corporation to meet their

Accountability Plan goals. In the absence of the New York State exams for students in 3rd-8th grade in 2019-20, the school administered the F & P assessment to monitor progress of its Kindergarten – 3rd grade students in reading at the end of the year. That year, 86% of students met or exceeded expectations on the F&P.

Based on the renewal reviews of the schools, the Institute finds that SACS-NYC, with support from the network, ensures that the education program is implemented with fidelity across each school as evidenced by academic achievement and corroborated by classroom observations, interviews with staff members, and document reviews. Despite all of the challenges presented by the global pandemic and transition to remote learning, SACS-NYC demonstrates its flexibility in meeting the needs of its students and families. Teachers ensure that lessons continue to provide students with ample opportunities to discuss critical thinking questions and engage with peers. Teachers also rely on technological features and applications such as breakout rooms, chat features, and Google Classroom to maximize student participation and engagement.

Based on the Institute’s review of each school’s performance as posted over the charter term; a review of the five Applications for Charter Renewal submitted by SACS-NYC; a review of academic, organizational, governance, and financial documentation; and, renewal reviews of each school under renewal consideration, the Institute finds that the schools meet the required criteria for charter renewal.

The Institute recommends the SUNY Trustees grant Success BedStuy 3, Success Harlem 6, and Success Hudson Yards each an Initial Full-Term Renewal, and Success Harlem 1 and Success Bronx 3 each a Subsequent Full-Term Renewal.

NOTEWORTHY - SUCCESS ACADEMY CHARTER SCHOOLS – NYC

SACS – NYC schools consistently outperform the majority of schools across the state. In 2018-19, 18 of the education corporation’s 28 schools with testing grades scored in the top 50 schools statewide in ELA. All 28 schools in the education corporation scored in the top 50 in mathematics.

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ACADEMIC PERFORMANCE



IS EACH SCHOOL AN ACADEMIC SUCCESS?

Success BedStuy 3, Success Bronx 3, Success Harlem 1, Success Harlem 6, and Success Hudson Yards are each an academic success. Each school meets all of its Accountability Plan goals.

At the beginning of the Accountability Period,⁸ each 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”⁹ and states the educational programs at a charter school must “meet or exceed the student performance standards adopted by the board of regents”¹⁰ 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’:

8. 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 an initial charter term, the Accountability Period covers the first four years the school provides instruction to students. 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.

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

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

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

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. SACS-NYC did not include any additional measures of success in the Accountability Plan it adopted for each school under renewal consideration.

The Institute analyzes every measure included in the school’s Accountability Plan to determine its level of academic success including the extent to which each school due for renewal this year has established and maintained a record of high performance, and established progress toward meeting its academic Accountability Plan goals throughout the charter term. The

9. Education Law § 2850(2)(f).

10. Education Law § 2854(1)(d).

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Institute identifies the required measures (absolute proficiency, absolute Measure of Interim Progress attainment,¹¹ 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 each of the individual School Overview sections.

The Institute analyzes all measures under a 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 each school coming to renewal and all SACS-NYC schools combined 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, a school's performance on the measure is not relative to the test, but relative to the strength of the school'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 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.

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

The Accountability Plan also includes a science goal and an ESSA goal, the latter of which replaced the No Child Left Behind ("NCLB") goal. Please note that for schools located in New York City, the Institute uses the CSD as the local school district.

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For the purposes of this report, the Institute presents the education corporation's aggregate data for all schools across the network to demonstrate the high levels of performance, presenting its aggregate absolute measure, its growth measure, and a comparative measure as compared to a composite district. The composite district represents each district where SACS-NYC schools are located. The composition gives proportional weight to each district based on the size of its student enrollment. The Performance Summaries for each individual school under consideration for renewal are available in the individual School Overview sections following the education corporation overview section.

In response to the COVID-19 pandemic, the Board of Regents canceled the administration of the 2019-20 3rd – 8th grade ELA and mathematics assessments; the 4th and 8th grade state science exam; and, the June and August administration of the Regents exams. The Institute requested that schools submit any evidence of progress toward meeting Accountability Plan goals collected from any interim or summative assessments that the school had available for the 2019-20 school year. Based on the school's existing track record of goal attainment and on information submitted in the 2019-20 Accountability Plan Progress Report, the Institute highlights achievement data in the Academic Attainment section below.

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SUNY RENEWAL BENCHMARK 1A

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

During its third charter term, Success Harlem 1 met its key Accountability Plan goals in high school graduation, college preparation, ELA, and mathematics. Notably, the school consistently posted high absolute achievement in ELA and mathematics over the term. In 2018-19, the school outperformed 97% of schools statewide in ELA and 99% of schools statewide in mathematics. In every year that the school enrolled a graduating class, 100% of the school's graduates matriculated into college. The school also met its science, social studies, and NCLB/ESSA goals over the term. In the absence of the New York State exams for students in 3rd – 8th grade in 2019-20, Success Harlem 1 administered the Fountas & Pinnell ("F & P") assessment to monitor progress of Kindergarten – 8th grade students in reading at the end of the year. The school continued to administer informal assessments aligned to the mathematics curriculum to students in Kindergarten – 7th and administered an internally-developed assessment aligned to the Algebra I Regents exam to its 8th grade students. That year, 89% of students met or exceeded expectations on the F&P and 95% of 8th grade students passed the Algebra I mock exam.

Success Bronx 3 consistently met its key Accountability Plan goals in ELA and mathematics during its charter term. Notably in 2018-19, the school outperformed over 97% of schools statewide in ELA and 98% of schools statewide in mathematics. The school also met its science and NCLB/ESSA goals. In the absence of the New York State exams for students in 3rd – 8th grade in 2019-10, Success Bronx 3 administered the F&P assessment to monitor the progress of its Kindergarten – 7th grade students in reading at the end of the year and continued to administer informal assessments aligned to the school's mathematics curriculum. That year, 84% of students met or exceeded expectations on the F&P assessment.

Success Harlem 1 met its graduation goal in the first three years the school enrolled a graduating class. In 2017-18, 89% of the school's 2014 Cohort graduated after four years, exceeding the absolute target by 14 percentage points and the district comparison by 11 percentage points. The following year, the school's graduation rate declined slightly to 81% but continued to exceed the absolute target and district comparison. In 2019-20, the school's Total Cohort enrollment increased from 31 students to 130 students. That year, 75% of the 130 students enrolled in the 2016 Cohort graduated at the end of four years, meeting the absolute target. District comparison data are not yet available. Although the school's graduation rate declined slightly as the cohort size increased, the school posted high rates of credit accumulation for its first and second year cohorts in 2019-20, a key leading indicator of future high graduation rates.

Success Harlem 1 met its college preparation goal during the charter term. From 2017-18 through 2019-20, 100% of the school's graduates matriculated into a college program in the fall following graduation surpassing the target of 75% each year. Additionally, the school administers a variety of exams to demonstrate college preparation. In all three years with four-year cohort data, at least 97% of the school's graduates passed at least one Advanced Placement ("AP") exam with a score of 3 or higher or achieved the college and career readiness benchmark score on the SAT, exceeding the target of 75%.

Success Harlem 1 met its ELA goal over the charter term. From 2015-16 through 2018-19, the school's students enrolled in at least their second year posted proficiency rates on the state's ELA exam that exceeded the absolute target of 75% and the district achievement each year. Notably in 2017-18, 90% of 3rd – 8th grade students enrolled in at least their second year scored at or above proficiency and surpassed the district proficiency rate by 25 percentage points. The school also posted consistently high results on its comparative effect size measure. In comparison to schools across the state enrolling similar percentages of economically disadvantaged students, Success Harlem 1 performed higher than expected to a large degree from 2014-15 through 2018-19. The school posted mean growth percentiles in ELA that exceeded the target of 50 in the first three years of the charter term. In 2018-19, the school's growth score fell slightly below the target but the school's absolute achievement remained high. That year, 84% of students scored at or above proficiency. At the secondary level, the school demonstrates achievement by administering the English Regents and English AP exam. Throughout the charter term, the school's Total Cohorts posted high rates of passing one or both of these exams. Notably in 2018-19, 62% of Total Cohort members passed the AP Literature exam with a score of 3 or higher.

Success Bronx 3 met its ELA goal. The school's students enrolled in at least their second year scored at or above proficiency on the state's ELA exam at rates that exceeded the absolute target of 75% in every year from 2015-16 to 2018-19. The school also outperformed the district achievement in all four years. Notably in 2017-18, with 92% of the school's students scoring at or above proficiency the school exceeded the absolute target by 17 percentage points and the district achievement by 57 percentage points. In comparison to schools across New York State enrolling similar percentages of economically disadvantaged students, Success Bronx 3 performed higher than expected to a large degree in every year the school produced testing results. Although the school posted mean growth percentiles that fell below the target of 50 in two years, the school's absolute achievement remained high.

Success Harlem 1 met its mathematics goal over the charter term posting consistently high absolute achievement. The school's students in 3rd – 8th grade enrolled for at least two years scored at or above proficiency at rates that exceeded the absolute target of 75% and the district comparison each year. Notably in 2017-18, 98% of Success Harlem 1's students scored at or above proficiency surpassing the absolute target by 23 percentage points and the district achievement by 38 percentage points. The school also posted comparative effect sizes above 3.0 in each year of the charter term far exceeding the target of 0.3. This level of achievement indicates 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. The school posted mean growth percentiles in mathematics that exceeded the target of 50 in 2015-16 and 2017-18 but fell below the target in the two other years in the charter term with available data. Although the school's mean growth score was below the target in those two years, the school's absolute achievement remained high. At the secondary level, the school demonstrates mathematics achievement by administering a number of exams including the Algebra Regents, Calculus AP exam, and SAT II Subject Test. Throughout the charter term, the school's Total Cohorts posted high rates of passing one or more of these exams. Notably in 2019-20, 88% of graduates achieved the Regents equivalency score on the SAT Subject Test in mathematics.

Success Bronx 3 also met its mathematics goal posting consistently high absolute achievement. From 2015-16 to 2018-19, at least 96% of the school's students enrolled in at least their second year scored at or above proficiency exceeding the absolute target of 75% each year. The school also outperformed the district in each year by at least 60 percentage points. Success Bronx 3 posted high comparative effect sizes from 2015-16 to 2018-19. This performance indicates the school performed higher than expected to a large degree compared to schools across the state enrolling similar proportions of economically disadvantaged students. In 2016-17 and 2017-18, the school posted mean growth percentiles in mathematics that surpassed the target of 50. Although the school's mean growth dropped below the target in 2018-19, the school's absolute achievement remained high.

Success Harlem 1 also met its science goal over the charter term. The school's students in 4th and 8th grade enrolled for at least two years posted proficiency rates that exceeded the absolute target of 75% and the district achievement in every year of the term. From 2014-15 through 2018-19, 100% of students scored at or above proficient on the exam. Over those years, the school surpassed the district performance by at least 20 percentage points. Notably in 2018-19, 85% of tested students scored at Level 4 indicating achievement exceeding grade level expectations. At the secondary level, the school's Total Cohorts posted high achievement in science. The school measures students' secondary science attainment using science Regents exams, science AP exams, and the SAT II Subject Test. Notably in 2019-20, 100% of graduates passed a science Regents exam or an AP science exam with a score of 3 or higher.

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Success Bronx 3 also met its science goal. From 2016-17 through 2018-19, 100% of the school's students in 4th grade scored at or above proficiency on the state science exam surpassing the absolute target of 75% each year. Further, the school outperformed the district each year by at least 16 percentage points. Notably in 2018-19, 99% of students scored at Level 4, the highest possible level indicating performance above grade level expectations.

Success Harlem 1 also met its social studies goal over the charter term. The school administers the Global Regents exam, U.S. History exam, and World History AP exam to its students to measure attainment of the goal. From 2017-18 through 2019-20, the school's four-year Total Cohorts posted high rates of passing either both social studies Regents exams with a score of 65 or higher, or passing one Regents exam with a score of 65 or higher and the World History AP exam with a score of 3 or higher. Notably in 2019-20, 66% of graduates passed the AP World History exam.

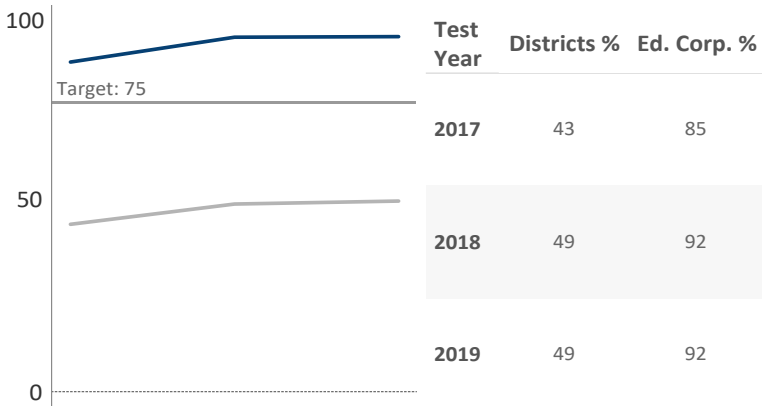
Success Bronx 3 and Success Harlem 1 met their ESSA goals, each remaining in good standing according to the state's accountability system over the charter term.

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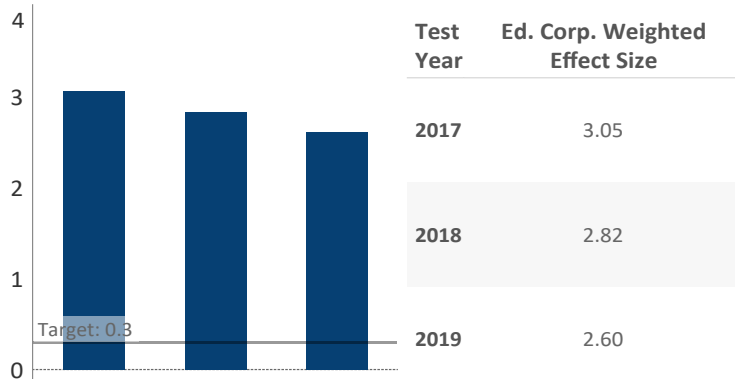
ACADEMIC PERFORMANCE

SUCCESS ACADEMY CHARTER SCHOOLS-NYC: AGGREGATE ENGLISH LANGUAGE ARTS PERFORMANCE FOR ALL SCHOOLS

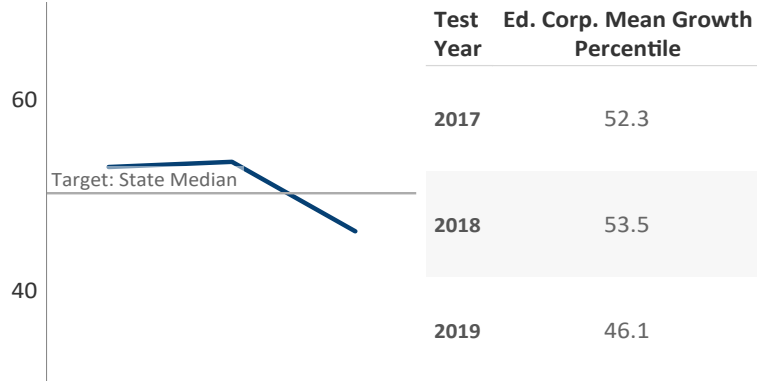
Comparative Measure: Composite District Comparison.* The chart shows the percentage of students enrolled in at least their second year at **the education corporation's schools** performing at or above proficiency in comparison to that of students in the same tested grades in **those schools' local districts**.



Comparative Measure: Effect Size. Schools are expected to exceed the predicted level of performance by an effect size of 0.3 or above according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State. The chart shows a weighted average effect size for all **education corporation schools** administering state exams.



Comparative Growth Measure: Mean Growth Percentile. The chart shows the unadjusted mean growth percentile for all tested students in grades 4-8 among **all education corporation schools**.



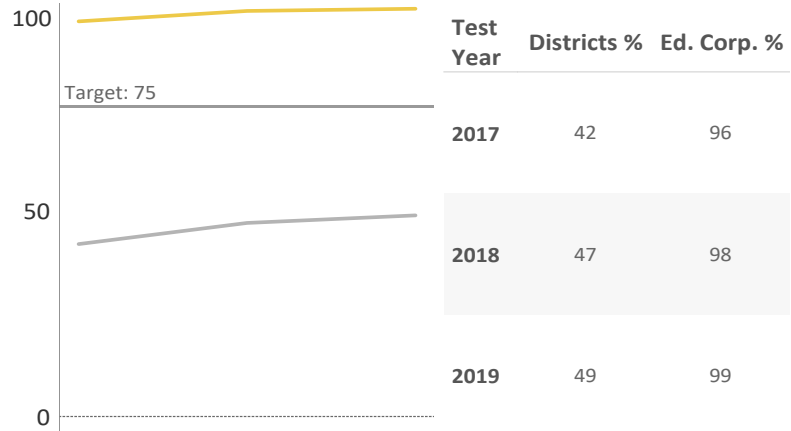
*The composite district comparison is a weighted proficiency rate including all comparison grades from New York City CSDs in which a SACS - NYC charter school is located.

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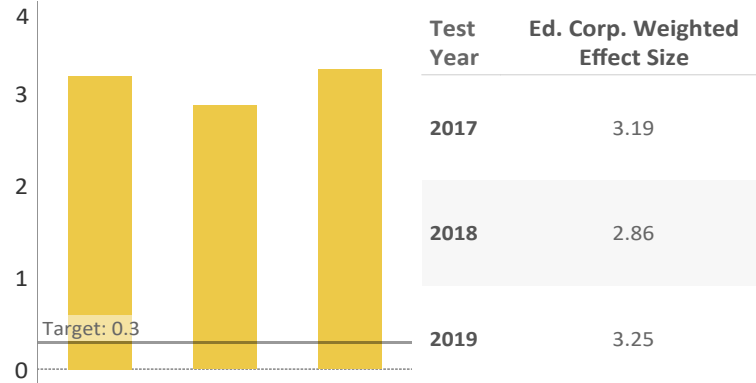
ACADEMIC PERFORMANCE

SUCCESS ACADEMY CHARTER SCHOOLS-NYC: AGGREGATE MATHEMATICS PERFORMANCE FOR ALL SCHOOLS

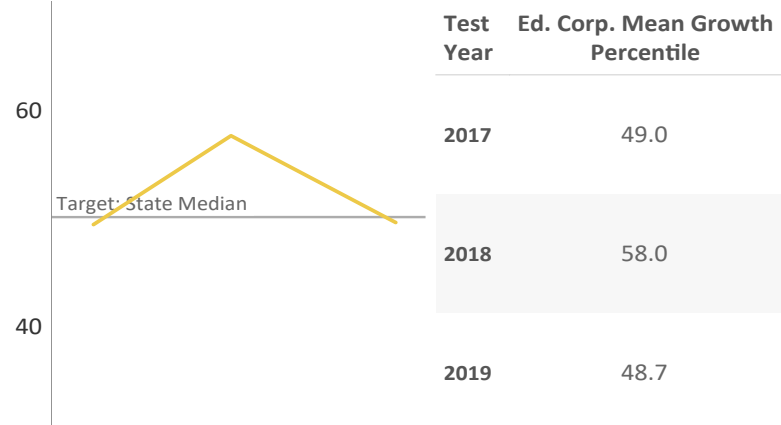
Comparative Measure: Composite District Comparison. The chart shows the percentage of students enrolled in at least their second year at **education corporation schools** performing at or above proficiency in comparison to that of students in the same tested grades in **those schools' local districts**.



Comparative Measure: Effect Size. Schools are expected to exceed the predicted level of performance by an effect size of 0.3 or above according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State. The chart shows a weighted average effect size for all **education corporation schools** administering state exams.



Comparative Growth Measure: Mean Growth Percentile. The chart shows the unadjusted mean growth percentile for all tested students in grades 4-8 among **education corporation schools**.

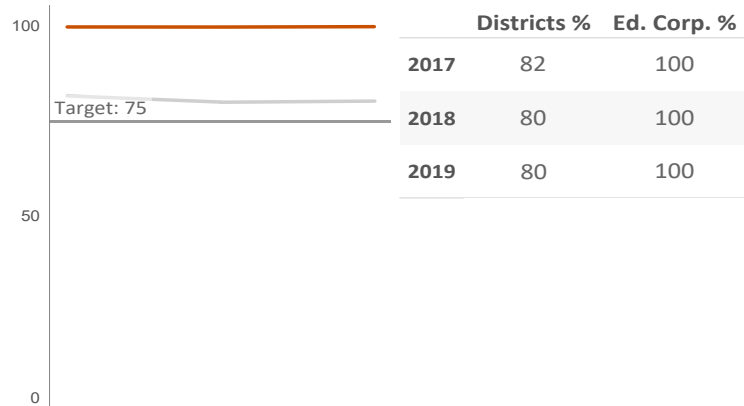


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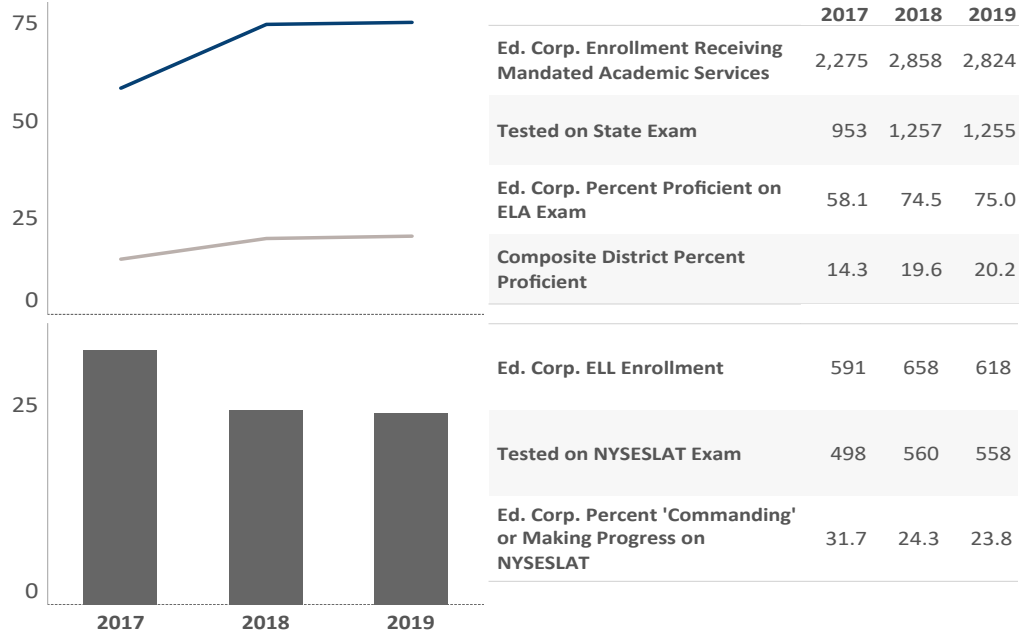
ACADEMIC PERFORMANCE

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

Comparative Measure:
Composite District. The chart shows the percentage of students enrolled in at least their second year at **education corporation schools** performing at or above proficiency in comparison to that of students in the same tested grades in **those schools' local districts.**



AGGREGATE PERFORMANCE OF STUDENTS WITH DISABILITIES AND ELLS FOR ALL SCHOOLS

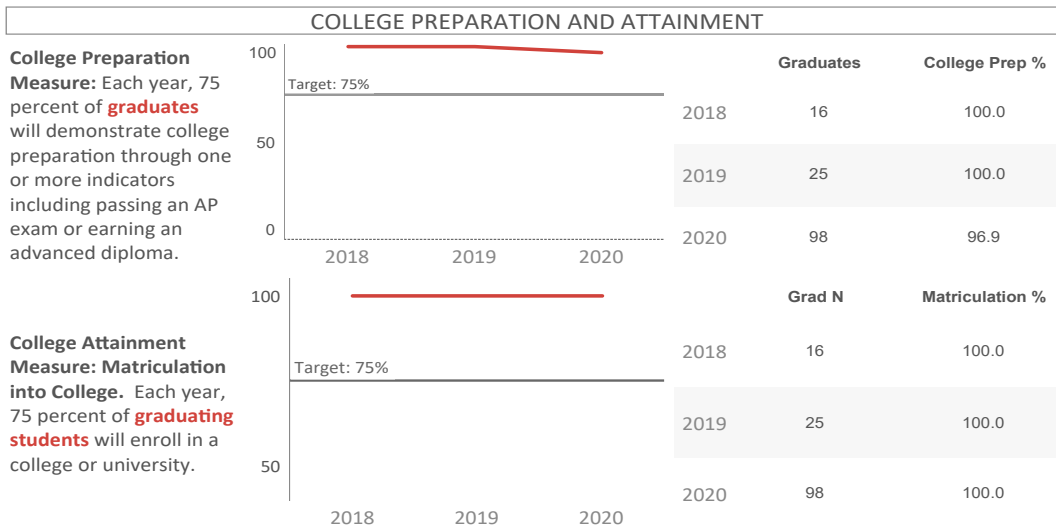
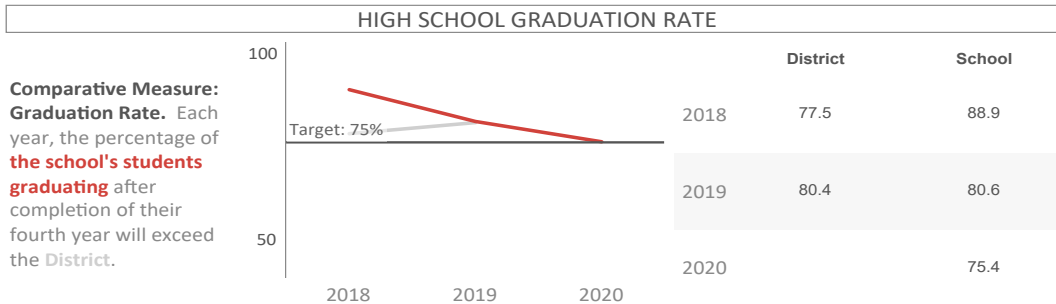


The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in a school's formal Accountability Plan. The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam. "Making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

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ACADEMIC PERFORMANCE

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



ENGLISH LANGUAGE ARTS AND MATHEMATICS

Comparative and Absolute Measure: District Comparison. Each year, the school's **ELA Accountability Performance Index** and the **math PI** will exceed the **district's PI** and the **state's MIP**.*

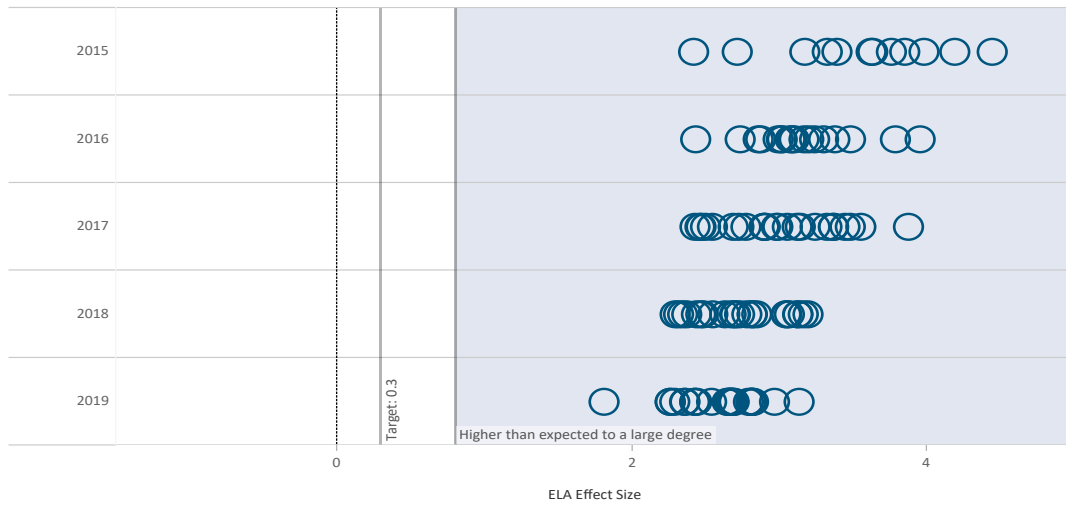
N/A

*The state does not calculate performance indices for cohorts that enroll less than 30 students. As such, the ELA and mathematics PIs are not reported here.

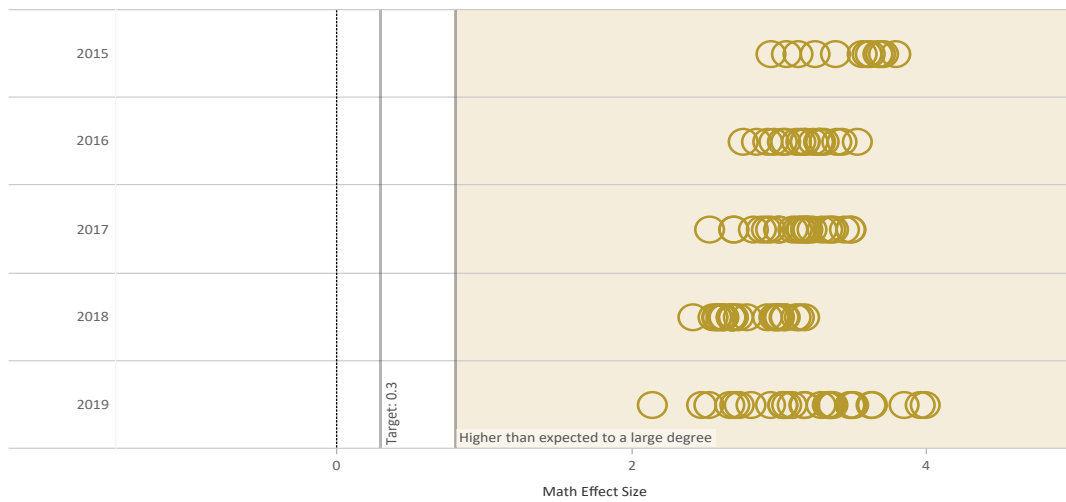
ACADEMIC PERFORMANCE

ELA AND MATH EFFECT SIZE DOT PLOTS: 2014-15 THROUGH 2018-19

ELA Effect Size by Year and School



Math Effect Size by Year and School



The charts illustrate the comparative effect size performance at each school across the ed corp by each year for which data are available throughout the charter term. Schools performing at or above 0.3 are meeting SUNY's benchmark for the measure. Schools performing at or above 0.8 are performing higher than expected to a large degree in comparison to schools enrolling similar levels of economically disadvantaged students.

ACADEMIC PERFORMANCE

DIFFERENCE BETWEEN SCHOOLS AND DISTRICT SCORES: ELA

Difference between ELA School and District Scores

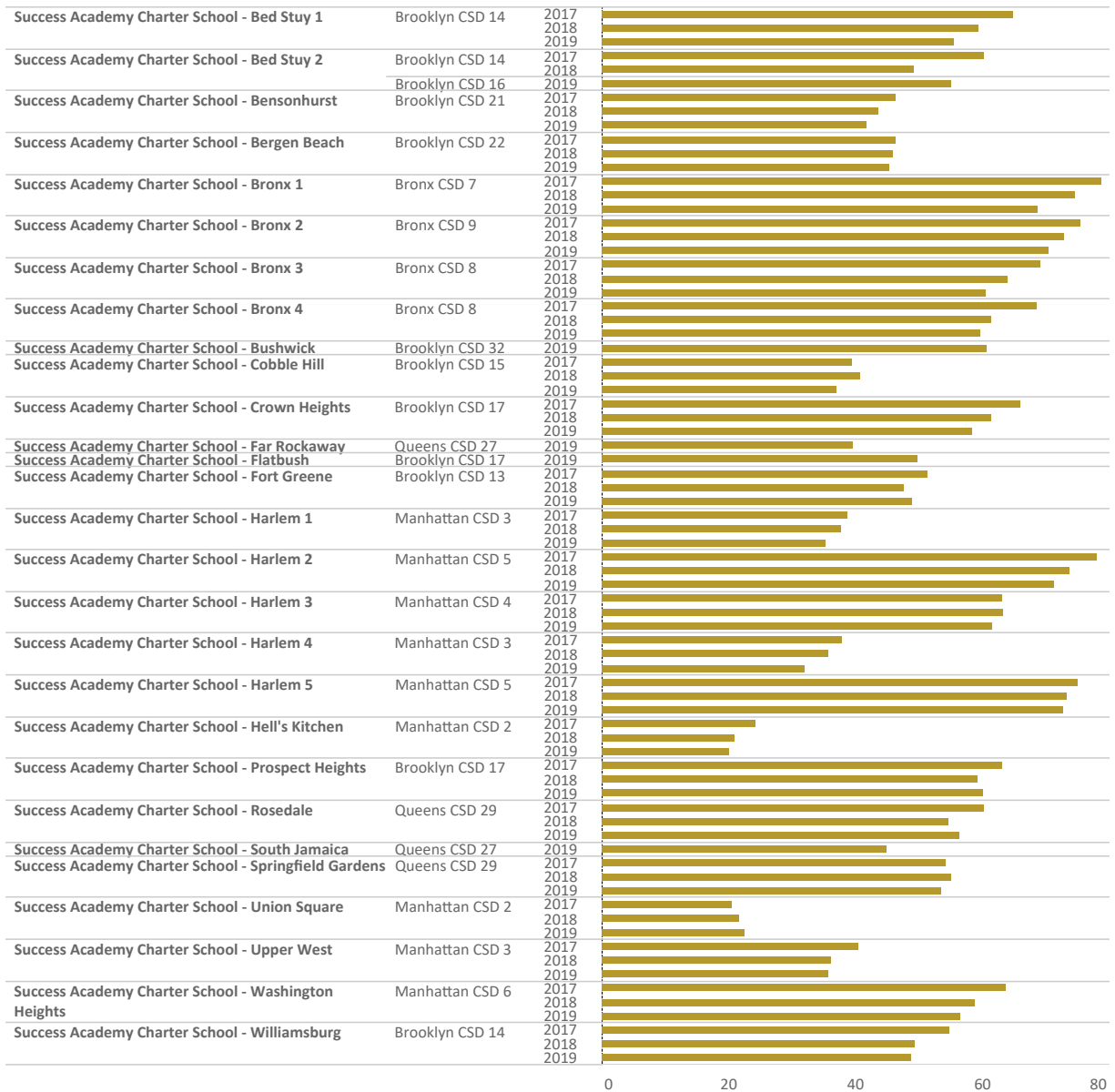


District difference for each year broken down by school and district (in NYC, the Institute uses the CSD). These charts compare a school's performance to that of the district. Each bar represents the difference between the school's performance and the district's. A positive result (showing the bar to the right of zero) indicates the amount by which the school outscored the district. A negative result (with the bar to the left of zero) illustrates the amount by which the school performed lower than the district. A score of zero indicates that the school performed exactly even with the district. School scores reflect the achievement of students enrolled for at least two years per the schools' Accountability Plans.

ACADEMIC PERFORMANCE

DIFFERENCE BETWEEN SCHOOLS AND DISTRICT SCORES: MATH

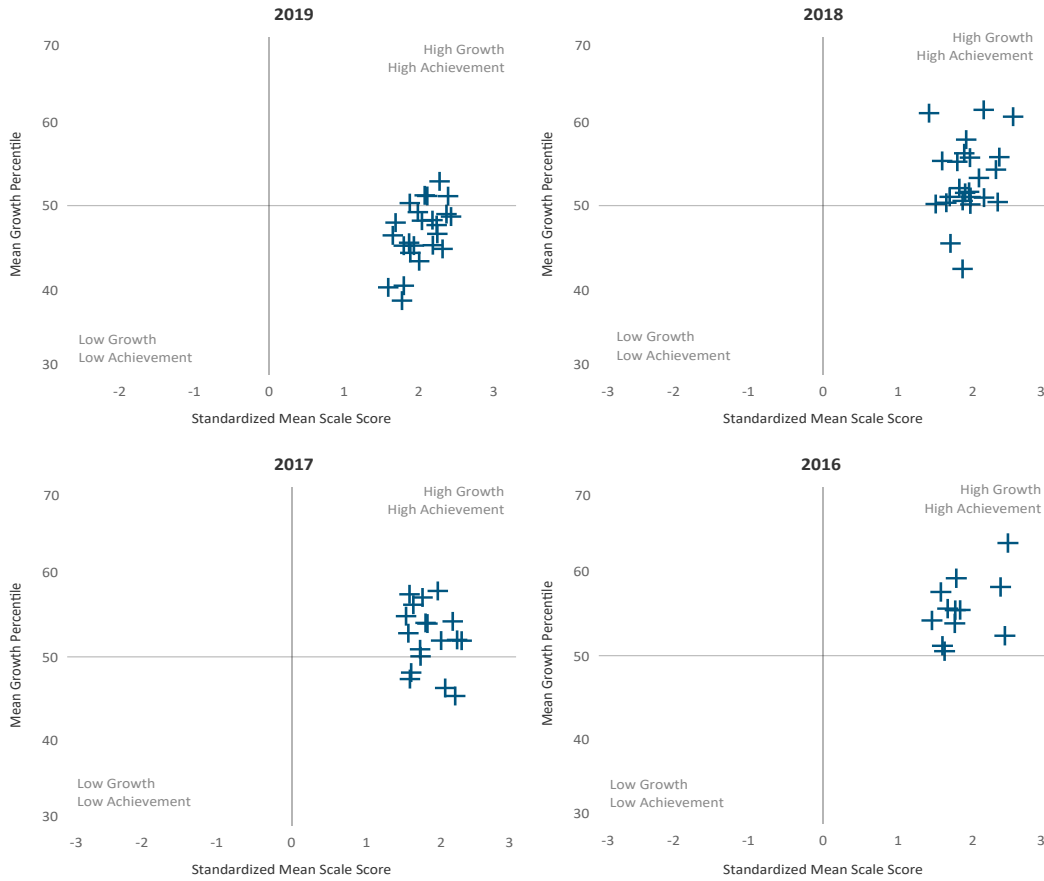
Difference between Math School and District Scores



District difference for each year broken down by school and district (in NYC, the Institute uses the CSD). These charts compare a school's performance to that of the district. Each bar represents the difference between the school's performance and the district's. A positive result (showing the bar to the right of zero) indicates the amount by which the school outscored the district. A negative result (with the bar to the left of zero) illustrates the amount by which the school performed lower than the district. A score of zero indicates that the school performed exactly even with the district. School scores reflect the achievement of students enrolled for at least two years per the schools' Accountability Plans.

ACADEMIC PERFORMANCE

ELA GROWTH AND ACHIEVEMENT: 2015-16 THROUGH 2018-19

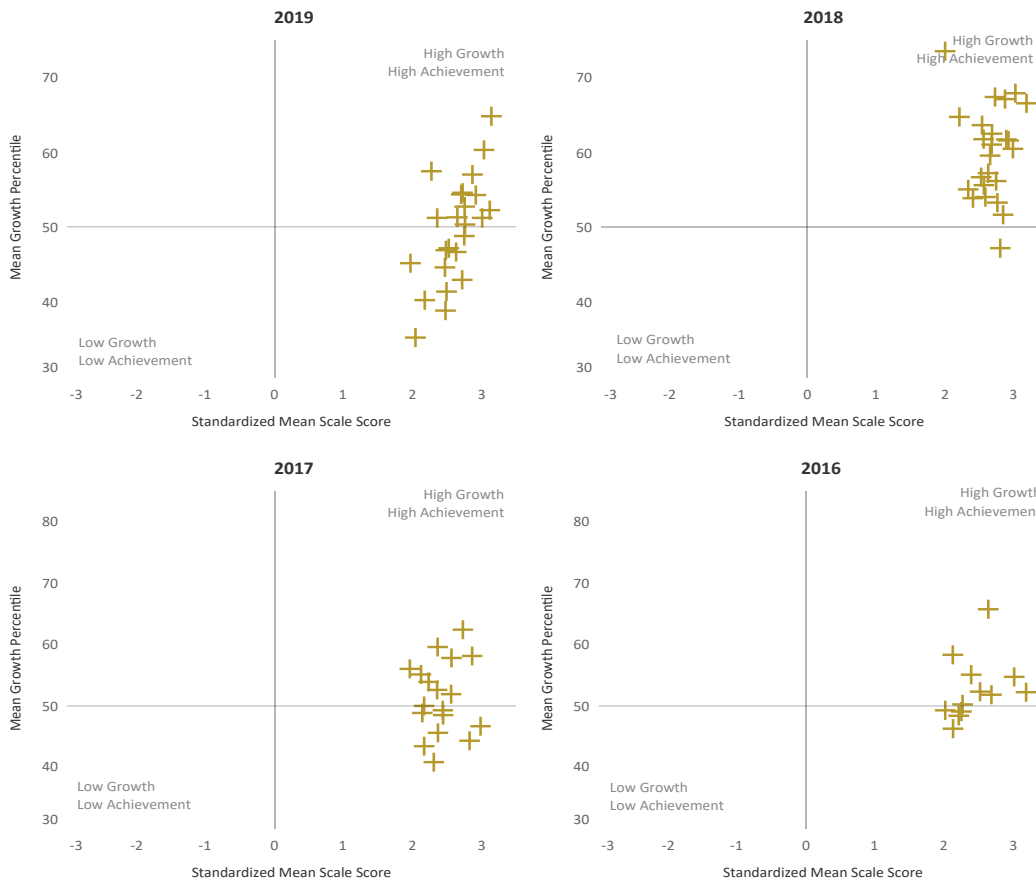


These charts compare a school's ability to grow student achievement with a school's absolute student performance. Schools located in the upper right hand quadrant of each chart show strong results in helping students make learning gains while at the same time helping students achieve strong absolute scores on state assessments. Schools in the lower right hand quadrant show strong absolute scores but lower growth. Because the student growth percentile uses the previous year's scale score as a baseline, it becomes more difficult for a school to maintain strong overall growth scores when students already post high absolute scores.

These charts are produced by comparing growth as measured by the state's student growth percentile to its overall achievement as measured by scale score standardized to the statewide grade level mean over each year for which data are available during the charter term. The growth axis (labeled Mean Growth Percentile) represents the statewide median growth score. The achievement axis (labeled Standardized Mean Scale Score) represents the statewide mean-centered achievement level for each grade served by each school.

ACADEMIC PERFORMANCE

MATH GROWTH AND ACHIEVEMENT: 2015-16 THROUGH 2018-19

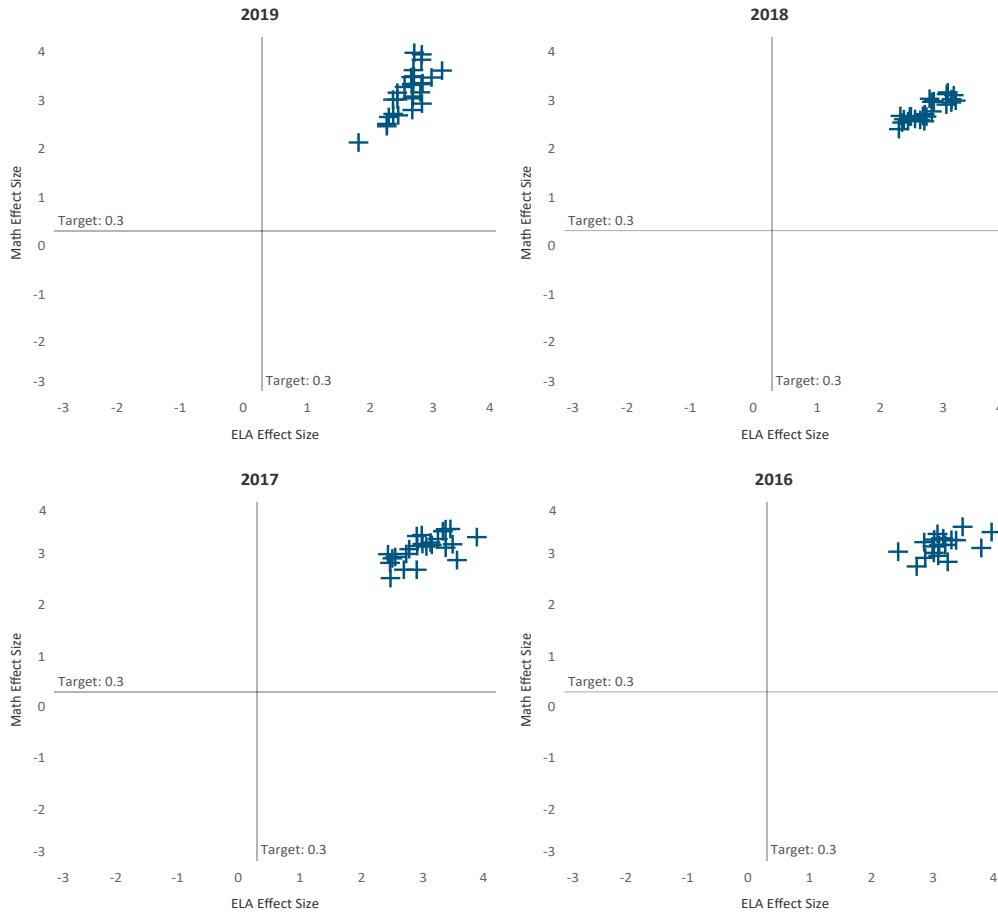


These charts compare a school's ability to grow student achievement with a school's absolute student performance. Schools located in the upper right hand quadrant of each chart show strong results in helping students make learning gains while at the same time helping students achieve strong absolute scores on state assessments. Schools in the lower right hand quadrant show strong absolute scores but lower growth. Because the student growth percentile uses the previous year's scale score as a baseline, it becomes more difficult for a school to maintain strong overall growth scores when students already post high absolute scores.

These charts are produced by comparing growth as measured by the state's student growth percentile to its overall achievement as measured by scale score standardized to the statewide grade level mean over each year for which data are available during the charter term. The growth axis (labeled Mean Growth Percentile) represents the statewide median growth score. The achievement axis (labeled Standardized Mean Scale Score) represents the statewide mean-centered achievement level for each grade served by each school.

ACADEMIC PERFORMANCE

ELA AND MATH EFFECT SIZE SCATTER PLOTS 2015-16 THROUGH 2018-19



The charts compare a school's ELA and math effect sizes over each year for which data are available during the charter term. An effect size measures school performance in comparison to other schools statewide enrolling students with similar proportions of economic disadvantage. Schools with an ELA or math effect size that is less than 0 performed lower than expected based on the economic disadvantage statistic. Schools posting an effect size greater than 0 but less than 0.3 perform about the same as the comparison schools. Schools with an ELA or math effect size greater than 0.3 (SUNY's performance target for the measure) outperformed similar schools statewide to a meaningful degree, while schools with effect sizes greater than 0.8 perform higher than expected to a large degree.

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The summary that follows is the education corporation’s approach to learning and teaching in a full in person model. The analysis that follows aligns with the program in place across schools within the education corporation for the first three and a half years of the current charter term. For an analysis of the academic program as implemented in a remote model, see the School Overview sections.

SUNY RENEWAL BENCHMARK 1B

DOES SUCCESS ACADEMY CHARTER SCHOOLS – NYC HAVE AN ASSESSMENT SYSTEM THAT IMPROVES INSTRUCTIONAL EFFECTIVENESS AND STUDENT LEARNING?

SACS-NYC implements a rigorous and comprehensive assessment system that improves instructional effectiveness and student learning. SACS-NYC schools administer a variety of diagnostic, formative, and benchmark assessments throughout the school year in order to determine students’ level of mastery and identify intervention needs. To measure students’ literacy skills, the schools administer the F&P¹² and Success for All¹³ (“SFA”) assessments, both of which have demonstrated success as academic interventions with urban and low-income students. Schools administer network-developed interim assessments in ELA, mathematics, and science as well as monthly tests in vocabulary and weekly tests in spelling and mathematics facts. The network’s process for creating assessments is rigorous; it includes opportunities to field test new items in order to assess their validity and reliability before incorporating into summative assessments.

Extensive training prepares teachers to implement valid and reliable processes for scoring assessments and evaluating results. For example, following each administration of interim assessments, grade level teachers exchange student work and set a consistent performance standard across classrooms; this norming practice ensures grading consistency. School-based data coordinators work in conjunction with network central staff members to provide thorough analyses of assessment data at the student, class, grade, and school levels using the network’s robust student information system (“SIS”). This portal serves as a repository for student data and allows schools and the network to analyze results across classrooms, grades, and schools. SIS performance reports allow leaders to review other schools’ data, which enables school to school comparisons across grade levels and assists in developing leaders’ plans for targeted coaching of teachers. In reviewing network-wide results, leaders can identify a teacher at another school whose students are performing exceptionally well in an area that students within his or her school find challenging. Thus, instructional leaders

12. The F&P assessment system is both formative and summative. It provides baseline information on students’ independent and assisted reading levels and enables progress monitoring against grade level standards.

For additional information, please visit www.heinemann.com/collection/bas/.

13. Originally developed by researchers at Johns Hopkins University, the SFA program is now implemented in approximately 1,000 schools nationwide. For additional information, please visit www.successforall.org.

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can plan teachers' peer observations of instruction across schools. Additionally, leaders and the network's instructional management team use data to identify topics for professional development and to identify strategies needed for general coaching. SACS-NYC schools continually uses assessment data to evaluate teacher and program effectiveness.

SUNY RENEWAL BENCHMARK 1C

DOES SUCCESS ACADEMY CHARTER SCHOOLS – NYC'S CURRICULUM SUPPORT TEACHERS IN THEIR INSTRUCTIONAL PLANNING?

SACS-NYC's rigorous, research based curriculum supports teachers in their instructional planning within and across grades. The network conducts ongoing reviews of its curricular materials to ensure that its schools prepare students for success on state assessments and in college and career. Beyond considering performance of students at its schools and across New York State, SACS-NYC reviews the practices of high performing schools (district, charter, and private) nationwide and education research developments while assessing its curricular strengths and weaknesses. During the school year, teachers work in grade level study teams to adjust instructional plans and provide feedback to instructional leaders who pass the information to network teams. School leaders complete annual surveys of the curriculum's effectiveness. Network content area teams manage revision of curricular materials by reviewing feedback from schools and piloting instructional materials in classrooms.

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

The academic program relies on a combination of network developed and commercial curricula. For ELA, SACS-NYC schools supplement its THINK Literacy framework with the SFA program, which uses a research based approach to enhance students' literacy skills through methods such as cooperative learning and frequent assessment of student understanding. In mathematics, the schools use TERC Investigations,¹⁴ a program that centers on teaching fundamental ideas of numbers, operations, data, and measurement, and Cognitively Guided Instruction, an instructional approach that builds from students' mathematical problem solving ability in the elementary grades. In the middle grades, schools use a network-developed program adapted from Mathematics in Context, a module based program that

14. For additional information, please visit investigations.terc.edu.

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challenges students to solve real world problems largely through peer discussion. Students develop higher order thinking and problem solving skills as they apply mathematical thinking to answer questions rich with realistic context that engages students. In addition to internally developed science and technology programs, SACS-NYC schools offer an array of specials classes including chess, theater, and dance.

IS HIGH QUALITY INSTRUCTION EVIDENT THROUGHOUT SUCCESS ACADEMY CHARTER SCHOOLS – NYC?

High quality instruction that creates consistent focus on academic achievement and develops students' higher-order thinking and problem-solving skills is evident across SACS-NYC schools. Across first year visits, mid charter term visits, and renewal visits to SACS-NYC schools, Institute teams who conducted classroom observations consistently found well crafted lessons that feature student-to-student interaction in solving real world problems, skillful questioning, and ongoing informal assessment of students' progress toward concept mastery.

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

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

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SUNY RENEWAL BENCHMARK 1E

DOES SUCCESS ACADEMY CHARTER SCHOOLS – NYC HAVE STRONG INSTRUCTIONAL LEADERSHIP?

SACS-NYC schools' strong instructional leadership practices include providing teachers with extensive coaching and professional development opportunities designed to catalyze accelerated student learning and achievement. Robust instructional teams at the school and network level support the development of instructional leaders and teachers with daily sustained and systemic coaching and professional development activities that interrelate with classroom practice. Teachers receive over 400 hours, on average, of professional development throughout the year, including intervisitation opportunities for teachers and leaders to observe strong teaching across network schools and data analysis days where staff members analyze benchmark assessments.

Schools throughout the education corporation set high expectations for teacher performance, measured largely by student achievement results. All schools use the SIS to monitor progress toward meeting network-wide performance goals as well as school-wide goals set by the leader. For example, a principal could set growth targets in addition to a network goal of 90 percent proficiency in a particular skill area.

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

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DOES SUCCESS ACADEMY CHARTER SCHOOLS – NYC MEET THE EDUCATIONAL NEEDS OF AT-RISK STUDENTS?

SACS-NYC schools have a wide range of strong supports in place to meet the needs of at-risk students. Teachers and leaders implement clear procedures for identifying and serving students with disabilities, ELLs, and students at risk of academic failure. During the 2018-19 school year, students with special needs represented 16.5 percent of enrollment across the network (while current and former students with special needs represented 17.0 percent of enrollment across the network), and ELLs comprised 3.6 percent of total enrollment (while current and former ELLs represented 9.1 percent of enrollment). Schools disaggregate student performance data on an ongoing basis to assess the effectiveness of instructional and behavioral interventions. Teachers across the network receive extensive professional development designed to prepare them to meet the needs of all students.

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

SACS-NYC schools educate students with disabilities in the least restrictive environment in accordance with each student’s IEP while offering additional supports embedded in its existing programming. The schools offer students with disabilities related services (e.g., speech/ language, occupational, physical and psychological therapy), integrated co-teaching (“ICT”) classrooms, individual and group counseling, behavior intervention plans, and additional

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supports within the RTI framework. For students requiring a self-contained setting, SACS-NYC offers 11 12:1:1 classrooms across its operating schools. Of the 2,615 students with disabilities enrolled on or about March 9, 2020, approximately 1,824 learned in ICT classrooms and 130 attended a 12:1:1 program. Teachers are well aware of students' IEP goals and collaborate with at-risk program staff to plan instruction and monitor progress. Student support teams meet regularly to discuss students' progress toward meeting IEP goals using disaggregated data from the network SIS, classroom assignments, and teacher observations.

SACS-NYC schools use the Home Language Identification Survey and the New York State Identification Test for English Language Learners ("NYSITELL") to identify students requiring English acquisition supports. SACS-NYC implements a comprehensive English language immersion program, focused on increasing early literacy skills. The schools serve ELLs within the core academic program, which provides abundant opportunities for oral and written communication through its curriculum. Schools monitor student progress annually with the New York State English as a Second Language Achievement Test ("NYSESLAT") and informally throughout the school year. Network professional development activities develop teachers' skills in supporting ELLs with strategies such as intentional seating, visual demonstrations, and the use of supplementary audio materials. These supports prove to be successful, with many ELLs reaching English proficiency and performing better than district peers on state ELA assessments.

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ORGANIZATIONAL PERFORMANCE



IS THE EDUCATION CORPORATION AN EFFECTIVE, VIABLE ORGANIZATION?

SACS-NYC is an effective and viable organization that ensures its schools have in place the key design elements identified in the charter. The education corporation’s board provides rigorous oversight to ensure that students demonstrate high levels of success.

IS SUCCESS ACADEMY CHARTER SCHOOLS – NYC FAITHFUL TO ITS MISSION AND DOES IT IMPLEMENT THE KEY DESIGN ELEMENTS INCLUDED IN ITS CHARTERS?

The schools within SACS-NYC are faithful to the mission and key design elements. These can be found in the Education Corporation Background section at the beginning of the report and Appendix A, respectively. With the SACS-NYC transition to remote learning, schools maintain their relentless focus on holding students to high expectations for learning. Schools continue to assess student learning and adjust supports to meet student needs. The schools continue to develop scholar talent by offering synchronous classes for chess, theater, and other talent areas.

ARE PARENTS/GUARDIANS AND STUDENTS SATISFIED WITH SUCCESS ACADEMY CHARTER SCHOOLS – NYC?

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

Parent Survey Data. The Institute compiled data from SACS-NYC’s 2019-20 family survey for each school under consideration for renewal this year. In spring 2020, SACS-NYC distributed a family satisfaction survey to all schools within the education corporation specifically gathering satisfaction information about the school’s program during remote learning times. In 2019-20, across all SACS-NYC schools, 76% of families who received the survey responded. Among respondents, 93% are satisfied with the schools’ core academic program and their transition to remote learning. Families expressed dissatisfaction with the school’s electives and scholar talent program, and SACS-NYC adjusted its program to develop a more effective program for electives.

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 BENCHMARK
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Parent Focus Group. The Institute asks all schools facing renewal to convene a representative set of parents for a focus group discussion. For a high performing education corporation, the Institute speaks with a representative set of parents across all schools due for renewal this year. A representative set includes parents of students in attendance at the schools for multiple years, parents of students new to the schools, parents of students receiving general education services, parents of students with special needs, and parents of ELLs. The Institute met virtually with 11 family representatives from SACS-NYC. Family members expressed high levels of satisfaction with the quality of learning and the ways in which the teachers engage and support students virtually to meet learning outcomes. Family members expressed appreciation for the schools listening to feedback from the spring 2020 remote learning period and making adjustments for this school year. One example is that families expressed concern about students low engagement and low participation in scholar talent classes, and identified that SACS-NYC made adjustments that yielded higher engagement and more opportunities to participate in scholar talent for the 2020-21 school year.

Persistence in Enrollment. An additional indicator of parent satisfaction is persistence in enrollment. Persistence data for each individual school due for renewal this year is available in Appendix A. Across the education corporation, 83% of students returned from the previous school year in 2019-20.

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 SUCCESS ACADEMY CHARTER SCHOOLS – NYC EFFECTIVELY SUPPORT THE DELIVERY OF THE EDUCATIONAL PROGRAM?

SACS-NYC establishes well functioning organizational structures with staff, systems, and procedures that support high levels of student achievement and effective delivery of the comprehensive educational program. Clear roles and responsibilities at both the school and network level allow school leaders to focus on student learning, instructional practice, and teacher development. Principals serve as primary instructional leaders and receive considerable support from assistant principals. Assistant principals focus largely on school culture, and operations staff members manage the day-to-day business of schools. Strong network supports and clearly established career paths assist SACS-NYC in recruiting and

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retaining high quality staff. Network level managing directors visit schools regularly to conduct classroom observations, coach teachers, and develop leaders' communication, management, and data analysis skills.

SACS-NYC has revised the assistant principal role in order to focus on retaining assistant principals in place, developing relationships with parents, and managing a variety of other academic functions at each school. Network staff members use student achievement results, classroom observations, coaching feedback, and other data to professionally develop assistant principals in place. When opportunities arise, assistant principals apply for and move into school leadership positions. SACS-NYC schools invest in teaching teams. Historically, the schools have entered into partnerships with Touro College and Hunter College whereby SACS-NYC teachers earn a master's degree from a graduate school of education at no cost while teaching full time. SACS-NYC would pay teachers' tuition. In the summer of 2018, SUNY approved SACS-NYC's teacher certification program under newly promulgated SUNY regulations. SACS-NYC prepared to certify its teachers for the 2018-19 school year. The courts have recently decided against the underlying SUNY regulations. Therefore, SACS-NYC is unable to certify its teachers as planned. SACS-NYC is developing a plan to support teachers to earn certification through several pathways and partnerships with local colleges. SACS-NYC had to put some of this work on hold to concentrate on the COVID-19 pandemic, but the board and network are moving forward to solidify plans and provide a clear tracking system to come into compliance with teacher certification requirements. The network has also developed an informal peer learning process that provides less experienced teachers opportunities to observe master teachers across network schools. As master teachers (known as labsite teachers) possess exceptionally strong instructional delivery and classroom management skills, school leaders may send teachers struggling to develop their own pedagogical practice in similar grade levels and/or content areas to observe one or more master teachers for live demonstrations of effective strategies. Master teachers also support the professional development of new teachers, often providing training to new teachers over the summer.

The network centrally manages student recruitment and efforts to meet enrollment and retention targets for students with disabilities, ELLs, and students who are eligible applicants to the FRPL program. See charts in Appendix A for information on enrollment and retention targets across the network. Efforts to recruit at-risk students include multilingual advertisements, informational sessions, and canvassing of local CSDs. SACS-NYC implements an ELL lottery preference to bolster its efforts to meet enrollment targets for ELLs.

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SACS-NYC continually monitors its programs and makes changes as necessary. The network instructional team, like school leaders, regularly uses the SIS to analyze student assessment data in order to identify which objectives students have mastered and which they have not. This determination may result in adjustments to pacing documents and/or other curricular materials. While school leaders have some discretion over implementation of certain program aspects, major changes are mainly driven by network analyses of data gathered from assessments, leaders' daily observations of classrooms, feedback from school leaders provided in annual surveys, and in real time, through informal communications throughout the year. Previous analyses have resulted in changes to existing curricular materials, development of supplementary materials, and modifications to professional development plans.

DOES THE SUCCESS ACADEMY CHARTER SCHOOLS – NYC BOARD WORK EFFECTIVELY TO ACHIEVE THE SCHOOLS' ACCOUNTABILITY PLAN GOALS?

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

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

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**DOES THE SUCCESS ACADEMY CHARTER SCHOOLS –
NYC 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 management organization accountable for both academic results and fiscal soundness.

- Minutes reflect the board effectively communicates with the management organization. The board regularly reviews the management contract to ensure that the board effectively monitors the relationship with the CMO. The network reports to the board on its own key performance indicators. As part of that reporting, the network recently implemented Success Governance Effectiveness (“EdGE”) across all departments, which allows network teams to address problems in a more effective and efficient manner.
- The management organization provides the board with an extensive amount of information on a variety of topics affecting the schools and the work of the network including finances, performance indicators, professional development, and philanthropy. In turn, the board demonstrates it takes effective and efficient action regarding deficiencies and has a continual eye on improving programming.
- The board works on overseeing growth as well as innovation and sharing of best practices with the rest of the education community. For these reasons, the board established the Education Institute with the network. The Education Institute provides broad access to the Success Academy model and curricula for educators across the country. The Robertson Center, a custom designed training facility, houses the network’s first lab school that allows outside educators to access SACS-NYC schools’ most effective practices at no cost.
- The board has overseen the establishment and growth of its programming into high school, which has yielded strong results for students in regard to graduation rates and matriculation into college.
- The board receives reports on finance and academics as well as extracurricular programming including summer programming for students.
- The board, with legal counsel, consistently reviews and amends policy.

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- The board materially complies with the terms of its by-laws and code of ethics.
- The board has overseen litigation defending the education corporation against allegations related to students with disabilities at certain schools using both in-house and outside counsel. The board also successfully prosecuted an action against the NYCDOE and NYSED regarding pre-Kindergarten funding and oversight, which ended up with a favorable decision from New York’s highest court in November 2018. The board also used network counsel to participate in all phases of the SUNY teacher certification regulations litigation, which terminated in September 2020.

SUNY
 RENEWAL
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HAS SUCCESS ACADEMY CHARTER SCHOOLS – NYC 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 a few minor exceptions across the schools due for renewal this year. In each of the areas out of compliance, the Institute will work with the education corporation to ensure compliance before the start of the next charter term.

- **Annual Reports.** Although the education corporation submitted its annual reports to the Institute and NYSED on time, it has not posted the annual reports on the Success Academy website in accordance with the charter and the Act. The Institute will ensure compliance prior to the start of the next charter term.
- **Board Meeting Minutes.** While the education corporation had been late in submission of board meeting minutes over the term, the education corporation has rectified this issue and was in compliance by the end of the 2018-19 school year.
- **Complaints.** Over the past three years, the Institute received no formal complaints regarding the education corporation as a whole (as opposed to individual school complaints). Of the five schools under renewal consideration, Success Bronx 3 had some formal complaints, which the Institute did not find any wrong doing as to the school. More information about the complaints are in the School Overview section for Success Bronx 3.
- **Teacher Certification.** The education corporation had been approved to conduct its own SUNY approved teacher certification program wherein the education corporation would have been in compliance with the Act’s teacher certification provisions. The courts have recently decided against underlying SUNY regulations, therefore, SACS-NYC

cannot provide teacher certifications. After the final court decision, the Institute asked SACS-NYC for a comprehensive compliance plan. The response included hiring teachers from Teach for America programs and colleges and universities with early childhood and middle school certification programs; targeting job boards and sourcing channels for experienced teachers; and, introducing flexibilities into the hiring process to better capture experienced teachers. The Institute will continue to work with the education corporation and network and monitor its certification plan. At the time of the renewal review, SACS-NYC was still exploring partnerships with colleges and universities.

- **Revisions.** The Institute requested the education corporation to pathway its sites in conjunction with the facilities SACS-NYC has been able to receive from NYCDOE. As the education corporation has not received all of its requested space, the education corporation has had to shift students to available space. As the district's decisions come late in the year this has caused delay in the appropriate requests and approvals for changes. The Institute and the education corporation have worked on a plan to ensure the most timely request within the timeline provided by the district for the resultant enrollment revisions.
- **Litigation.** In May 2019, the U.S. Department of Education ("USDOE") found the network had violated the Family Rights and Privacy Act when it released information considered personally identifiable. Although the network did not use the name of a student, the information provided could be linked to the student. The network argued that the parent had waived their right to consent to disclosure when they initiated the dialogue in the public sphere and the network was correcting information provided. The USDOE's found the parent had not waived their right to consent and the network had violated FERPA. The network is currently appealing the finding. The Chief Privacy Officer at the New York State Education Department also found that the network had violated a section of the New York Education Law for the disclosure of personally identifiable information in relation to the same incident.
- **Students with Disabilities.** In July 2020, NYSED's Office of Special Education issued a decision against the NYCDOE in a case alleging certain violations in reference to students with disabilities brought by SACS-NYC. NYSED found the NYCDOE had failed to provide settings and services as written in a student's IEP despite being notified twice by SACS-NYC. NYSED ordered a compliance assurance plan to be implemented by NYCDOE.

Please refer to the School Overviews for information on each individual school.

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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, SACS – NYC is fiscally sound as are Success BedStuy 3, Success Bronx 3, Success Harlem 1, Success Harlem 6, and Success Hudson Yards. The SUNY Fiscal Dashboard presents color-coded tables and charts indicating that the schools and the education corporation have demonstrated fiscal soundness over the majority of the charter term, but, during the last charter term,¹⁵ the Institute noted facility related enrollment issues that weakened affected charters. (The SUNY Fiscal Dashboard for each school is included in the corresponding School Overview and the Fiscal Dashboard for the SACS – NYC merged education corporation is included in Appendix B). The discussion that follows relates mainly to the merged education corporation because a school is not a legally distinct fiscal entity.

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 each school and finds it too is fiscally sound. The network provides full support services to the schools in the area of academic, operations, technology, facilities and financial operations under the terms of a management contract for a fee of 15%. The SACS – NYC financial model is intended to ensure that all fully enrolled schools are financially sustainable and operate solely through public funding. The model generally assumes cost-free public space for facilities. At the end of 2019-20, the actual enrollment of the overall merged education corporation reached 82% of chartered enrollment, which is slightly above the lower enrollment collar of 20% below chartered enrollment. As enrollment drives fiscal strength, the SACS – NYC board should continue to monitor actual enrollment versus chartered enrollment of each open charter. The Institute is working with SACS – NYC to revise chartered enrollment numbers to more accurately reflect the space available to each school. To support the opening of additional schools, the SACS-NYC board will have to ensure sufficient funds are in place for school start-up.

In response to the COVID-19 situation, SACS-NYC proactively budgeted conservatively for the 2020-21 school year including a decrease in budgeted revenues and increase in certain expenses. Additionally, SACS-NYC included budgeted expenses for personal protective equipment and other COVID-19 support costs to ensure the schools were prepared to open as scheduled.

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

Working in partnership with the network, the schools employ clear budgetary objectives and budget preparation procedures throughout the charter term.

- School and network financial leadership form the budget team for SACS-NYC. The team develops each school's budget using a model designed to achieve self-sufficiency and based on unique requirements of each program. Rather than the chartered enrollment for each school, SACS-NYC budgets enrollment at levels that reflect all space limitations. The budgets rely on historical actual revenues and expenses and programmatic changes to ensure that the staff can properly support the proposed enrollment and capacity appropriate for each site.

Please refer to the School Overviews below for budgeting and long range planning information for each individual school.

SUNY RENEWAL BENCHMARK 3B

DOES THE EDUCATION CORPORATION MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

The individual schools and SACS-NYC have a history of sound fiscal policies, procedures and practices, and maintain appropriate internal controls.

- SACS-NYC Financial Policies and Procedures Manual guides all internal controls and procedures for the schools. The manual contains fiscal policies and procedures that undergo ongoing reviews.
- SACS-NYC audit reports have had no findings of deficiencies. The most recent audit for June 30, 2020 was received by the November 1, 2020 due date and reported a strengthening fiscal condition.

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SUNY RENEWAL BENCHMARK 3C

DOES THE EDUCATION CORPORATION COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

The schools and SACS-NYC comply with financial reporting requirements.

- Over the charter term, the schools have provided the Institute, NYSED, and NYCDOE with required financial reports that are on time, complete, and follow generally accepted accounting principles.
- Independent audits of annual financial statements have received unqualified opinions with no material weaknesses or instances of non-compliance observed.
- The schools and SACS-NYC have generally filed key reports timely including: audit reports, budgets, unaudited quarterly reports of revenue, expenses, and enrollment. The Institute is working with the schools and network to monitor facility and enrollment concerns.

SUNY RENEWAL BENCHMARK 3D

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

The schools and SACS-NYC maintain the financial resources to ensure stable operations. The schools' annual audits provide the information used to create the fiscal dashboard. The SACS-NYC fiscal condition has improved to fiscally strong after two financially strong fiscal years. The Institute continues to monitor SACS-NYC fiscal stability.

- For merged education corporations there is one balance sheet that contains the combined assets and liabilities of all the schools within the merged entity. In order to review the operations of each individual school's operating activities, individual dashboards reflect the revenues and expenditures to show operating surpluses and deficits.
- The merged education corporation financial audit reports total assets increased from \$74M to \$86M over the most recent audited fiscal year. The cash position of the education corporation improved significantly for the second consecutive year.
- The merged education corporation SACS-NYC had total net assets increase from approximately \$22M to \$55M as of the most recent audit report. For the fiscal year 2019-20, SACS – NYC reported an operating surplus of \$33M. The Institute is monitoring the fiscal trend of the merged education corporation and working with the network and schools to ensure a fiscal plan is in place to continue the upward trend.

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- For the year ended June 30, 2020, SACS-NYC incurred approximately \$42M in management fees and other expenses paid by the network on behalf of SACS-NYC. Each new charter is supported in the planning and startup period from the merged education corporation. Historically, a startup can cost upwards of \$1 million. SACS-NYC does not plan on opening any new schools in the next school year.

The Institute has ongoing conversations with the management organization as well as the SACS-NYC board to monitor the education corporation's fiscal condition. The education corporation has experienced lower enrollment at the middle school grades driven by challenges associated with SACS-NYC's ability to secure public school facilities space in its originally projected timeframe. The education corporation currently projects the delay in identifying adequate space for the middle school programs will resolve in two to three years adjusting for the longer timeframe to access public school space. Also during this charter term, SACS-NYC has begun to locate in market rent private facilities and is in the process of securing additional private space to enable enrollment expansion. Philanthropic funds raised by SACS-NYC's management organization are used to support all SACS-NYC schools but do not appear directly on the education corporation's financials. The Institute will continue, in a future charter term, to support the SACS-NYC board with regular updates reflecting the education corporation's quarterly financials as applied to the SUNY financial dashboard and fiscal health indicators and regular reviews with the management organization's fiscal team.

Please refer to the School Overviews for information on each individual school's financial condition.

SCHOOL OVERVIEWS



- 50** Success Academy Charter School – BedStuy 3
- 64** Success Academy Charter School – Bronx 3
- 79** Success Academy Charter School – Harlem 1
- 99** Success Academy Charter School – Harlem 6
- 112** Success Academy Charter School – Hudson Yards

Success Academy Charter School – BedStuy 3

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SCHOOL OVERVIEW

PAGES: 51-63

SO

SCHOOL
OVERVIEW

PS

PERFORMANCE
SUMMARIES

FD

FISCAL DASHBOARD

FP

FUTURE PLANS

SUCCESS ACADEMY CHARTER SCHOOL – BEDSTUY 3

DOES THE SCHOOL IMPLEMENT THE EDUCATIONAL PROGRAM WITH FIDELITY TO THE EDUCATION CORPORATION'S DESIGN?

Based on a review of the school's Application for Charter Renewal, discussions with teachers, leaders, and SACS-NYC board members during the charter term, and a review of the academic program, Success Academy Charter School – Bedford Stuyvesant 3 fully implements the academic program as outlined in the education corporation overview and is an academic success, having met its key Accountability Plan goals.

SCHOOL BACKGROUND

The SUNY Trustees approved the original charter for Success BedStuy 3 on October 8, 2014. The school opened its doors in the fall of 2016 initially serving 94 students in Kindergarten and 1st grade. However, the school is authorized to serve 295 students in 5th – 7th grade during the 2020-21 school year. If renewed, the school will continue to serve students in 5th – 8th grade with a projected total enrollment of 444 students.

The current charter term expires on July 31, 2021. A subsequent charter term would enable the school to operate through July 31, 2026. The school is co-located in a NYCDOE building at 787 Lafayette Avenue, Brooklyn, NY 11221, in CSD 16. The building also houses P.S. 025 Eubie Blake School, a district school serving students in pre-Kindergarten – 5th grade.

During the 2018-19 school year, Success BedStuy 3 did not operate due to NYCDOE co-located space issues. The NYCDOE originally allocated co-located space in a district school building, then in spring 2018 reversed the space decision. Success BedStuy 3 then did not have an adequate facility space to serve its students and dispersed students to other SACS-NYC schools in close proximity to Success BedStuy 3 for the 2018-19 school year. The NYCDOE then provided space for Success BedStuy 3 that would accommodate its middle school grades, and the school resumed instruction for 5th and 6th grade in 2019-20.

NOTEWORTHY - SUCCESS BEDSTUY 3

Scholar talent blocks continue to run high quality programs synchronously during remote learning. To support students with peer to peer interaction, the school's theatre teacher worked with students to develop storytelling skills and put on the school's version of The Moth, a New York City based storytelling forum.

ACADEMIC PROGRAM

Success BedStuy 3 has prioritized coaching and support for teachers to ensure students have a robust and rigorous synchronous academic program during the remote learning period. Since the school originally planned to open this school year in a hybrid model, leaders added teachers to assist with both in person and remote learning. As SACS-NYC shifted to full remote until December, the school now utilizes those extra teachers to support classrooms by having at least three teachers in all ICT classrooms. The additional adults in each classroom allows teachers to deliver more teacher directed small group sessions and meet the needs of students, especially students with disabilities. Teachers are strategic in grouping students for small group work with some students serving as discussion leaders during breakout sessions.

Success BedStuy 3 leaders implement a robust professional development program to ensure that teachers are fully equipped and knowledgeable to deliver its remote learning program. This effective training translates to seamless and high quality lessons for students. Teachers also continue the effective collaborative practices that typically occur at SACS-NYC schools. Through consistent virtual team meetings, teachers unpack units and lessons for the upcoming week, conduct practice teaching rounds, and analyze data to understand gaps in learnings. Through these meetings, leaders attend and support teachers by providing meaningful feedback from lesson observations and help with thinking about how to pivot instruction within a unit to meet student needs.

Teachers appreciate the level of detail and support from the school's operations team to support effective work across multiple software programs. The operations team closely tracks student issues with technology and urgently acts to troubleshoot and replace devices as needed.

LEGAL REQUIREMENTS

Success BedStuy 3 substantially complies with applicable laws, rules and regulations, and provisions of the charter.

Complaints. The Institute did not receive any formal complaints regarding this school during the charter term.

Teacher Certification. At the time of the renewal review, Success BedStuy 3 was out of compliance regarding teacher certification. The Institute will continue to work with the education corporation and network to monitor the implementation of the certification plan.

FINANCIAL CONDITION

Success BedStuy 3's projected five year budget reflects anticipated stable revenues and expenses associated with the planned enrollment. The school requested a charter revision for chartered enrollment and chartered grades for 2018-19 to 2020-21. The school did not reopen in 2018-19 and reported only 56% actual enrollment compared to chartered enrollment in 2019-20. The school was also under enrolled by 18% - 31% in each during which it provided instruction. The network closely monitors the enrollment across the entire education corporation to ensure that the under enrollment of Success BedStuy 3 does not adversely affect the education corporation's aggregate actual enrollment goals, and the education corporation's enrollment across all schools closely aligns with the budgeted enrollment. The school will grow to serve 5th – 8th grade in the next charter term. SACS-NYC is confident that Success BedStuy 3 will have the opportunity to remain in its current space for the full course of the next charter term.

Success BedStuy 3 opened in 2016-17 as part of the SACS-NYC portfolio. The school has consistently reported operating deficits, which were offset against accumulated operating surpluses of the merged education corporation. The net assets of the school as of June 30, 2020 were (\$1.8M).

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SCHOOL OVERVIEW

K-4 SCHOOL LEADERS

Molly Gortz Dubiel (March 2017 to 2017-18)

Matthew McSorley, Interim (March 2017)

Rita Deng (August 2016 to February 2017)

5-8 SCHOOL LEADERS

Kristin Damo (2018-19 to Present)

SCHOOL CHARACTERISTICS - SUCCESS BEDSTUY 3

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2016-17	190	94	49%	K-1
2017-18	250	156	62%	K-2
2018-19	0	0	N/A	No Grades
2019-20	151	85	56%	5-6
2020-21	295	158	54%	5-7

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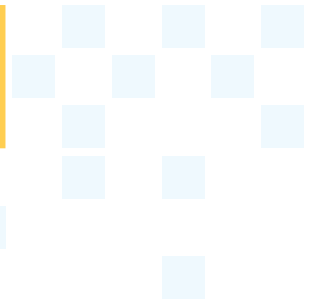
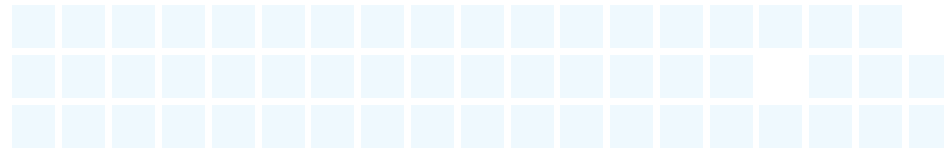
SCHOOL OVERVIEW

SUMMARY OF PUBLIC COMMENTS

The NYCDOE jointly held its required hearing on Success Harlem 1's and Success BedStuy 3's renewal applications on October 8, 2020 by videoconference. Forty-three people were present, but no one spoke during the hearing.

ENROLLMENT AND RETENTION

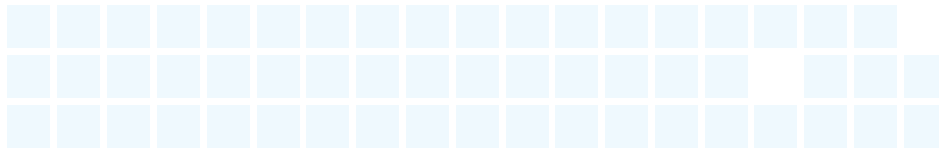
Success Academy Charter School - Bed Stuy 3's Enrollment and Retention Status: 2019-20		Target	School
enrollment	economically disadvantaged	82.0	66.7
	English language learners	5.3	0.0
	students with disabilities	16.7	21.8
retention	economically disadvantaged	91.8	79.4
	English language learners	92.0	NA
	students with disabilities	91.9	100.0



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PERFORMANCE SUMMARIES

DATA NOT YET AVAILABLE



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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BED STUY 3

NOTE: Effective 2016-17, the school merged into the education corporation, "Success Academy Charter Schools - NYC." 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/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 2016-17				
	2015-16	MERGED 2016-17	MERGED 2017-18	MERGED 2018-19	MERGED 2019-20
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/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Net Assets					
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
ACTIVITIES					
Operating Revenue					
Resident Student Enrollment	-	1,431,929	2,477,219	-	1,389,632
Students with Disabilities	-	141,006	468,800	-	170,399
Grants and Contracts					
State and local	-	202,541	-	-	-
Federal - Title and IDEA	-	64,070	8,217	-	227,672
Federal - Other	-	514,202	22,251	-	-
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	-	-	-
Food Service/Child Nutrition Program	-	25,877	53,010	-	-
Total Operating Revenue	-	2,379,625	3,029,497	-	1,787,703
Expenses					
Regular Education	-	2,319,098	2,547,115	0	1,758,357
SPED	-	316,241	942,084	0	718,202
Other	-	-	-	-	-
Total Program Services	-	2,635,339	3,489,199	0	2,476,559
Management and General	-	185,132	308,299	(0)	221,400
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	-	2,820,471	3,797,498	0	2,697,959
Surplus / (Deficit) From School Operations	-	(440,846)	(768,001)	(0)	(910,256)
Support and Other Revenue					
Contributions	-	7,936	5,194	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	-	5,810	8,751	-	5,585
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	-	13,746	13,945	-	5,585
Total Unrestricted Revenue	-	2,393,371	3,043,443	-	1,793,288
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	-	2,393,371	3,043,443	-	1,793,288
Change in Net Assets	-	(427,100)	(754,055)	(0)	(904,672)
Net Assets - Beginning of Year - GRAPH 2	-	217,595	(209,504)	(921,799)	(921,799)
Net Assets - End of Year - GRAPH 2	-	(209,505)	(963,559)	(921,799)	(1,826,471)

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SUCCESS ACADEMY CHARTER SCHOOL - BED STUY 3

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SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2015-16	2016-17	2017-18	2018-19	2019-20
Personnel Service					
Administrative Staff Personnel	-	250,726	417,164	0	390,558
Instructional Personnel	-	939,694	1,328,291	0	1,141,041
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	1,190,420	1,745,455	0	1,531,598
Fringe Benefits & Payroll Taxes	-	213,500	334,074	(0)	267,801
Retirement	-	32,374	49,176	(0)	33,514
Management Company Fees	-	207,833	361,818	-	206,034
Building and Land Rent / Lease	-	-	4,826	-	-
Staff Development	-	42,097	64,130	-	33,852
Professional Fees, Consultant & Purchased Services	-	12,083	8,037	-	8,731
Marketing / Recruitment	-	127,701	81,768	-	33,255
Student Supplies, Materials & Services	-	336,657	299,725	(0)	197,674
Depreciation	-	207,019	280,656	0	78,442
Other	-	450,789	567,833	0	307,058
Total Expenses	-	2,820,472	3,797,498	0	2,697,959

SCHOOL ANALYSIS

ENROLLMENT

	2015-16	2016-17	2017-18	2018-19	2019-20
Original Chartered Enrollment	-	190	250	380	510
Final Chartered Enrollment (includes any revisions)	-	190	250	-	151
Actual Enrollment - GRAPH 4	-	94	156	-	85
Chartered Grades	Planning Year	K-1	K-2	K-3	K-4
Final Chartered Grades (includes any revisions)	-	-	-	No Grades	5-6

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2015-16	2016-17	2017-18	2018-19	2019-20
Increase over prior year	-	-	14,527	-	16,150
	0.0%	0.0%	100.0%	0.0%	100.0%

PER STUDENT BREAKDOWN

Revenue

Operating	-	25,315	19,420	-	21,019
Other Revenue and Support	-	146	89	-	66
TOTAL - GRAPH 3	-	25,461	19,509	-	21,085

Expenses

Program Services	-	28,036	22,367	-	29,119
Management and General, Fundraising	-	1,969	1,976	-	2,603
TOTAL - GRAPH 3	-	30,005	24,343	-	31,722
% of Program Services	0.0%	93.4%	91.9%	0.0%	91.8%
% of Management and Other	0.0%	6.6%	8.1%	0.0%	8.2%
% of Revenue Exceeding Expenses - GRAPH 5	0.0%	-15.1%	-19.9%	0.0%	-33.5%

Student to Faculty Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
0.0	7.2	7.8	0.0	4.3

Faculty to Admin Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
3.8	4.3	4.0	16.3	3.8

Financial Responsibility Composite Scores - GRAPH 6

Score	2015-16	2016-17	2017-18	2018-19	2019-20
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	0.0	0.0	0.0	0.0	0.0
	N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

Net Working Capital	0	0	0	0	0
As % of Unrestricted Revenue	0.0%	0.0%	0.0%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.0	0.0	0.0	0.0	0.0
Risk (Low \geq 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent \geq 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

Score	0.0	0.0	0.0	0.0	0.0
Risk (Low \geq 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent \geq 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	N/A	N/A	N/A

Debt to Asset Ratio - GRAPH 7

Score	0.0	0.0	0.0	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	N/A	N/A	N/A

Months of Cash - GRAPH 8

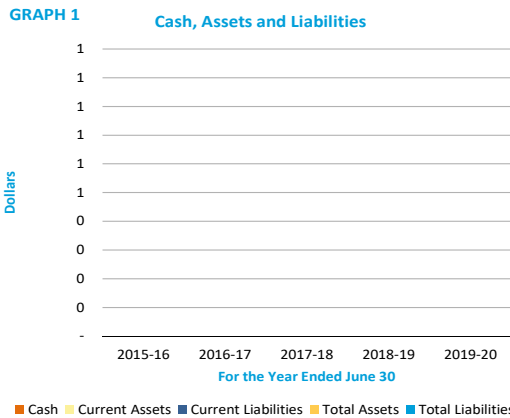
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	N/A	N/A	N/A	N/A

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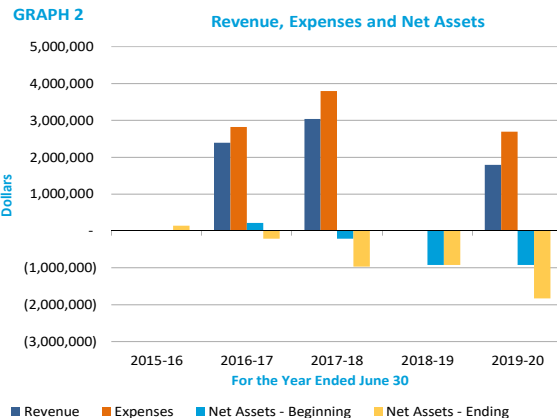
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BED STUY 3

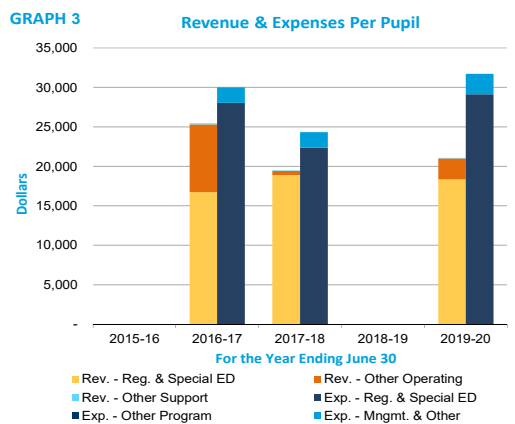
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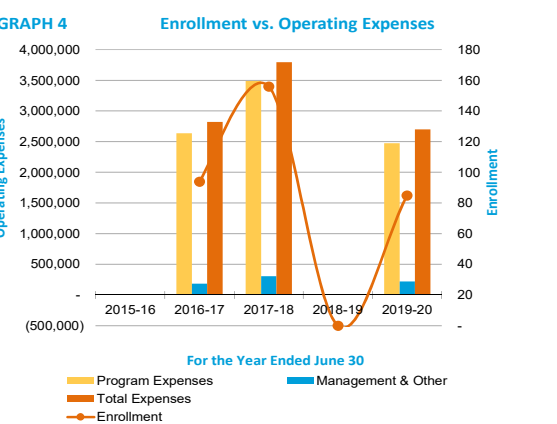
This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 through 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally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



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



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



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

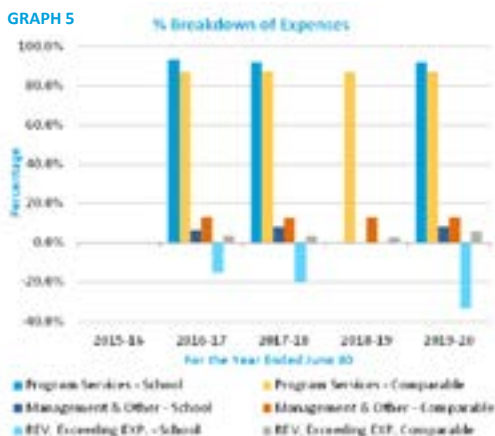
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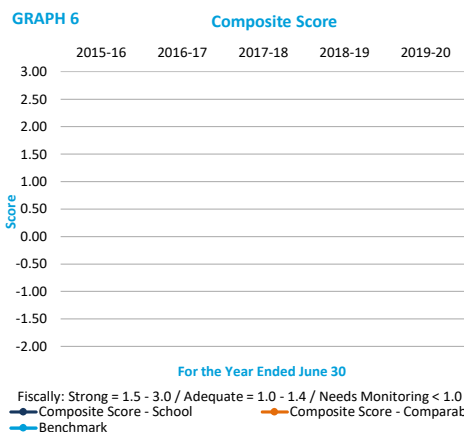
SUCCESS ACADEMY CHARTER SCHOOL - BED STUY 3

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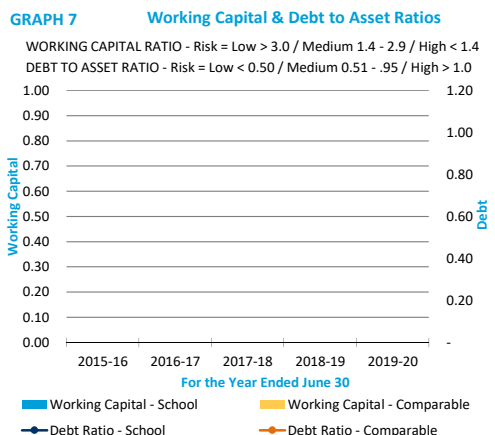
Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)



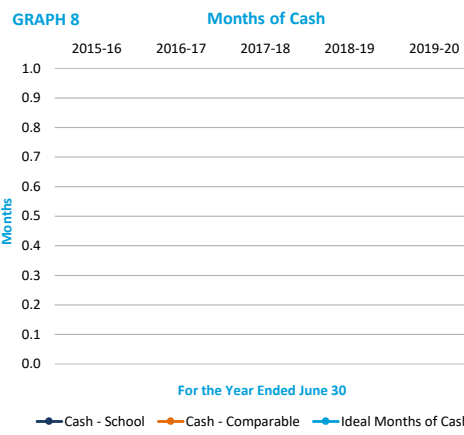
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of management & other expense. The percentage of revenues exceeding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



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



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



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

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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?

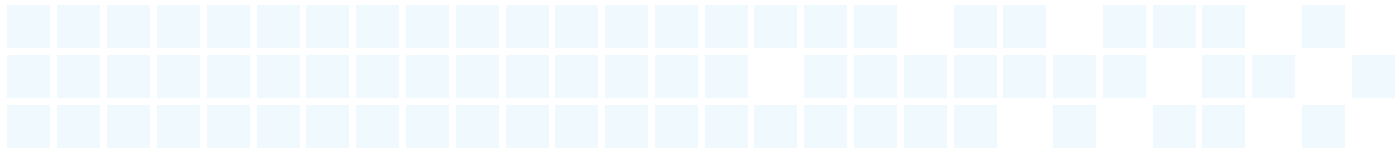
Success BedStuy 3 is an academic success. The school operates as an effective and viable organization. SACS-NYC plans to continue to operate the school in the same manner, making its plans for the school's future sound.

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. Success BedStuy 3 plans to continue to implement the same core elements of its educational program that aligns with the SACS-NYC educational approach across all schools in the education corporation. These core elements allow schools across the education corporation to achieve their Accountability Plan goals year after year. As the school continues its remote learning plan with plans to transition to hybrid learning, leaders are taking necessary steps to collect diagnostic and formative data points throughout the year to assess student need and make any necessary steps to adjust school programming to meet the needs of students and raise student achievement in any future charter term.

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

SUCCESS BEDSTUY 3		
	CURRENT	END OF NEXT CHARTER TERM
Enrollment	295	444
Grade Span	5-7	5-8
Teaching Staff	24	41
Days of Instruction	183	180



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Success BedStuy3 plans to continue instruction and operation in its current NYCDOE space for the next charter term.

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.



Success Academy Charter School – Bronx 3

So

SCHOOL OVERVIEW

PAGES: 65-78

SO

SCHOOL
OVERVIEW

PS

PERFORMANCE
SUMMARIES

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SUCCESS ACADEMY CHARTER SCHOOL – BRONX 3

DOES THE SCHOOL IMPLEMENT THE EDUCATIONAL PROGRAM WITH FIDELITY TO THE EDUCATION CORPORATION'S DESIGN?

Based on a review of the school's Application for Charter Renewal, discussions with network leaders and SACS-NYC board members during the charter term, and a review of the academic program's track record of meeting its Accountability Plan goals, Success Academy Charter School – Bronx 3 fully implements the academic program as outlined in the education corporation overview and is an academic success having met its key Accountability Plan goals.

SCHOOL BACKGROUND

The SUNY Trustees approved the original charter for Success Bronx 3 on June 25, 2012. The school opened its doors in the fall of 2013 initially serving 190 students in Kindergarten and 1st grade. The school is authorized to serve 1,273 students in Kindergarten – 8th grade during the 2020-21 school year. If renewed, the school will grow to serve students in Kindergarten – 12th grade with a projected total enrollment of 2,148 students.

The current charter term expires on July 31, 2023. A subsequent charter term would enable the school to operate through July 31, 2028. Success Bronx 3's Kindergarten – 4th grade are co-located at 1000 Teller Avenue, Bronx, New York in CSD 9. The school also houses M.S. 594, New Millennium Bronx Academy of the Arts, and South Bronx International Middle School, both of which serve 6th – 8th grade. The middle school grades are located at 965 Longwood Avenue, Bronx, New York in CSD 8. The school shares space with Longwood Preparatory Academy, a 9th – 12th grade NYCDOE school.

NOTEWORTHY - SUCCESS BRONX 3

In all three years that Success Bronx 3 administered the state science exam, 100% of all tested students scored at or above proficiency.

ACADEMIC PROGRAM

The Institute’s monitoring protocols and assurances from the network confirm that Success Bronx 3 implements SACS-NYC’s rigorous, high quality program with fidelity to its design, which is the same program found in SACS-NYC schools that produce high academic achievement as measured by the state exams and the network’s internal assessments. Success Bronx 3’s results on both the state exams and internal ELA and mathematics assessments provide evidence that the school meets and exceeds its Accountability Plan goals during this charter term.

LEGAL REQUIREMENTS

Success Bronx 3 substantially complies with applicable laws, rules and regulations, and provisions of the charter.

Complaints. The Institute received several formal complaints regarding the school. In one complaint, the family requested a letter of suspension be removed from a student’s file. The Institute found that without any allegation regarding how the school violated the law or charter, the Institute had no jurisdiction. Two formal complaints alleged an ICT classroom was not appropriately staffed by qualified personnel. In each instance, the Institute found the classroom was staffed by a certified special education teacher along with a general education teacher. Finally, one complaint alleged the school violated the Family Educational Rights and Privacy Act (“FERPA”) when the school shared students information with a related service provider. The Institute found the related service provider had a legitimate educational interest in the student information. Therefore, the school did not violate FERPA.

Teacher Certification. At the time of the renewal review, Success Bronx 3 was out of compliance substantially regarding teacher certification. The Institute will continue to work with the education corporation and network to monitor the implementation of the certification plan.

FINANCIAL CONDITION

Success Bronx 3’s projected five year budget reflects anticipated stable revenues and expenses associated with the planned enrollment. Success Bronx 3 requested enrollment revisions for the 2019-20 and 2020-21 school year to increase the chartered enrollment for the growing Kindergarten – 8th grade program. The school anticipates remaining in its NYCDOE co-located facilities for the next charter term.

Since Success Bronx 3’s opening in 2013-14, the school has reported both operating surpluses and deficits, which are offset against the surpluses. The net assets of the school as of June 30, 2020 were \$5.7 million.

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SCHOOL OVERVIEW

K-4 SCHOOL LEADERS

Katherine Huntington (2020-21 to Present)

Kimberley Schacht (2017-18 to 2019-20)

Dan Rojas (2015-16 to 2016-17)

Colleen Stewart (2013-14 to 2014-15)

5-8 SCHOOL LEADERS

Tahiri Jean-Baptiste (2019-20 to Present)

Britney Weinberg-Lynn (2018-19)

SCHOOL CHARACTERISTICS - SUCCESS BRONX 3

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2016-17	510	412	81%	K-4
2017-18	675	472	70%	K-5
2018-19	576	612	106%	K-6
2019-20	1,081	985	91%	K-7
2020-21	1,273	1,119	88%	K-8

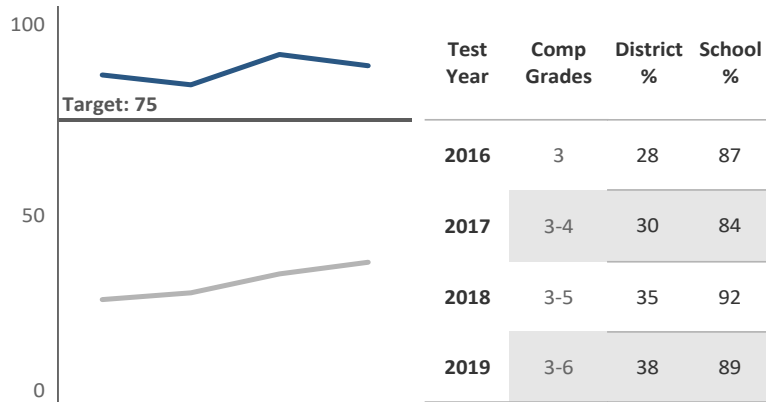
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SCHOOL OVERVIEW

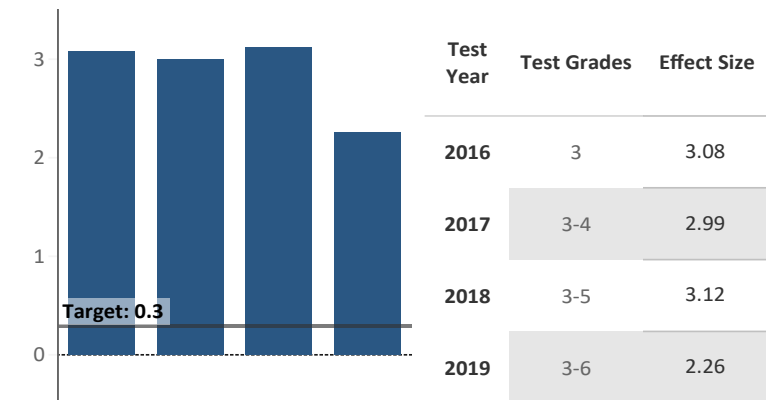
SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

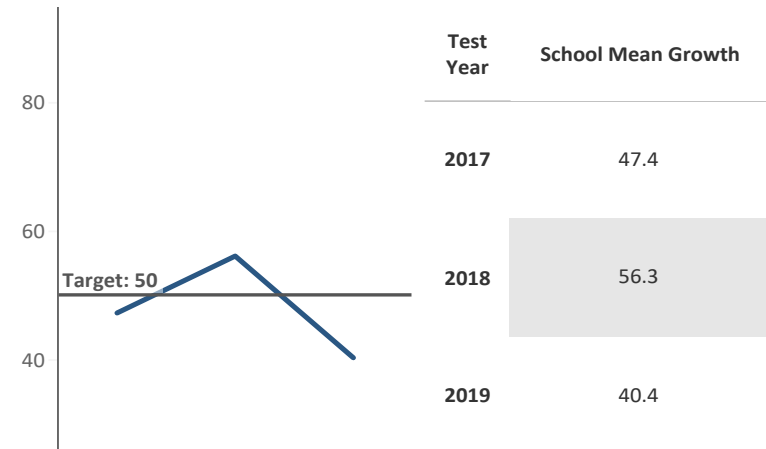
Comparative Measure: District Comparison. Each year, the percentage of students at **the school** in at least their second year performing at or above proficiency in ELA will be greater than that of students in the same tested grades in **the district**.



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 target of 50 in **ELA**.



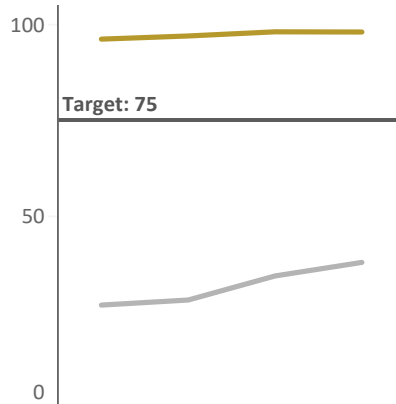
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SCHOOL OVERVIEW

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

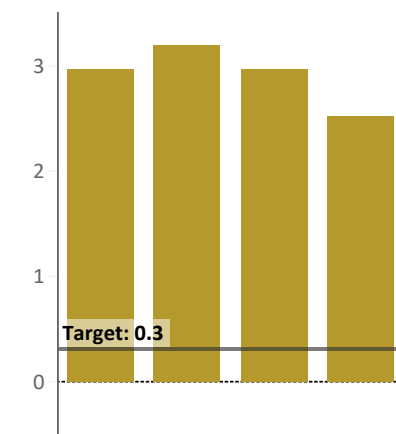
MATHEMATICS ACCOUNTABILITY PLAN GOAL

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



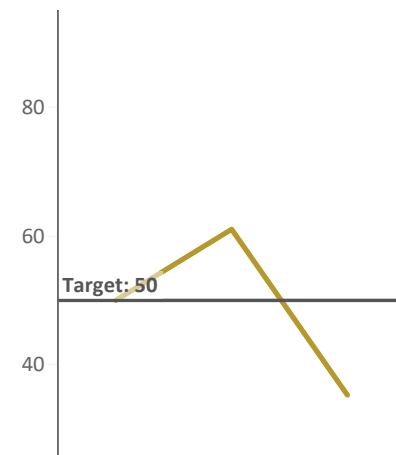
Test Year	Comp Grades	District %	School %
2016	3	27	96
2017	3-4	28	97
2018	3-5	34	98
2019	3-6	38	98

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



Test Year	Test Grades	Effect Size
2016	3	2.96
2017	3-4	3.19
2018	3-5	2.96
2019	3-6	2.52

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



Test Year	School Mean Growth
2017	50.1
2018	61.1
2019	35.4

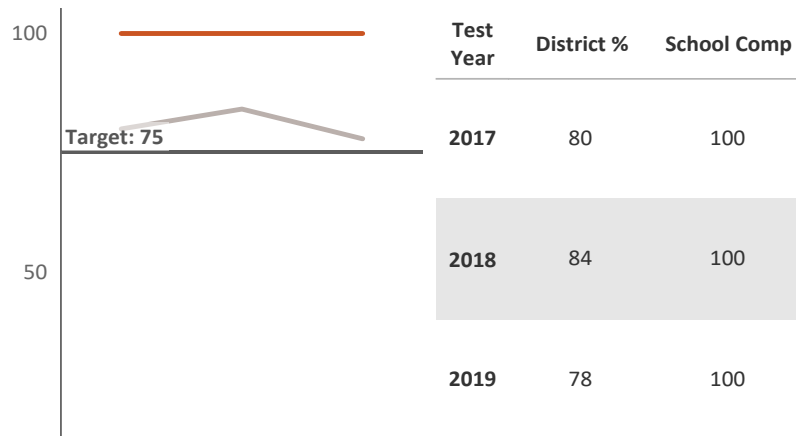
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SCHOOL OVERVIEW

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

SCIENCE ACCOUNTABILITY PLAN GOAL

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



SPECIAL POPULATIONS PERFORMANCE

	2017	2018	2019
Enrollment Receiving Mandated Academic Services	70	81	112
Tested on State Exam	22	29	49
School Percent Proficient on ELA Exam	54.5	82.8	53.1
District Percent Proficient	8.9	12.7	13.2
	2017	2018	2019
ELL Enrollment	22	27	16
Tested on NYSESLAT Exam	18	22	16
School Percent 'Commanding' or Making Progress on NYSESLAT	33.3	27.3	25.0

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.

In order to comply with Family Educational Rights and Privacy Act regulations on reporting education outcome data, the Institute does not report assessment results for groups containing five or fewer students and indicates this with an "s."







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SCHOOL OVERVIEW

NO COMMENTS RECEIVED

ENROLLMENT AND RETENTION

Success Academy Charter School - Bronx 3's Enrollment and Retention Status: 2019-20

			Target	School
enrollment	economically disadvantaged		87.6	86.7
	English language learners		12.5	4.9
	students with disabilities		21.6	15.7
retention	economically disadvantaged		90.8	82.8
	English language learners		90.3	85.0
	students with disabilities		91.2	94.4

Pf

PERFORMANCE

Su

SUMMARIES

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PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: ENGLISH LANGUAGE ARTS

Success Academy Charter School - Bronx 3

		2016-17 Grades Served K-4				2017-18 Grades Served K-5				2018-19 Grades Served K-6									
Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET				
3	86.2 (87)	88.2 (76)		3	95.5 (89)	96.6 (58)		3	96.7 (91)	97.2 (71)		3	96.7 (91)	97.2 (71)					
4	79.0 (81)	80.6 (72)		4	92.5 (80)	91.8 (73)		4	91.0 (78)	93.1 (72)		4	91.0 (78)	93.1 (72)					
5	(0)	(0)		5	87.5 (64)	89.1 (55)		5	65.9 (123)	67.5 (40)		5	65.9 (123)	67.5 (40)					
6	(0)	(0)		6	(0)	(0)		6	91.1 (56)	90.9 (55)		6	91.1 (56)	90.9 (55)					
7	(0)	(0)		7	(0)	(0)		7	(0)	(0)		7	(0)	(0)					
8	(0)	(0)		8	(0)	(0)		8	(0)	(0)		8	(0)	(0)					
All	82.7 (168)	84.5 (148)	YES	All	92.3 (233)	92.5 (186)	YES	All	83.6 (348)	89.5 (238)	YES	All	83.6 (348)	89.5 (238)	YES				
Grades	PI	AMO		Grades	PI	MIP		Grades	PI	MIP		Grades	PI	MIP					
3-4	182	111	YES	3-5	209	101	YES	3-6	195	105	YES	3-6	195	105	YES				
1. Each year 75 percent of students who are enrolled in at least their second year will perform at or above proficiency on the New York State exam.																			
2. Each year the school's aggregate Performance Index on the State exam will meet the state Measure of Interim Progress set forth in the State's ESSA accountability system.																			
3. Each year the percent of students enrolled in at least their second year and performing at or above proficiency will be greater than that of students in the same grades in the local district.																			
4. Each year the school will exceed its predicted performance on the state exam by an effect size of 0.3 or above based on a regression analysis controlling for economically disadvantaged students statewide.																			
3-4	84.5	29.5	YES	3-5	92.5	34.5	YES	3-6	89.5	37.6	YES	3-6	89.5	37.6	YES				
Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES
3	92.8	86.2	27.8	3.27	3	83.2	95.5	41.0	2.88	3	83.3	617.0	595.7	2.43	3	83.3	617.0	595.7	2.43
4	82.5	79.0	30.0	2.68	4	87.6	92.5	36.5	2.96	4	80.5	613.0	594.8	2.18	4	80.5	613.0	594.8	2.18
5					5	80.0	87.5	28.2	3.65	5	85.0	612.0	594.4	2.16	5	85.0	612.0	594.4	2.16
6					6					6	75.5	614.0	594.3	2.29	6	75.5	614.0	594.3	2.29
7					7					7					7				
8					8					8					8				
All	87.8	82.7	28.9	2.99	YES	83.8	92.3	36.0	3.12	YES	82.0	613.9	594.8	2.26	YES	82.0	613.9	594.8	2.26
Grades	School	State	State	Grades	School	State	State	Grades	School	State	Grades	School	State	Grades	School	State	Grades	School	State
4	47.4	47.4	48.7	4	48.7	47.3	47.3	4	47.3	47.3	4	47.3	47.3	4	47.3	47.3	4	47.3	47.3
5	0.0	0.0	65.5	5	65.5	39.8	39.8	5	39.8	39.8	5	39.8	39.8	5	39.8	39.8	5	39.8	39.8
6	0.0	0.0	0.0	6	0.0	32.2	32.2	6	32.2	32.2	6	32.2	32.2	6	32.2	32.2	6	32.2	32.2
7	0.0	0.0	0.0	7	0.0	0.0	0.0	7	0.0	0.0	7	0.0	0.0	7	0.0	0.0	7	0.0	0.0
8	0.0	0.0	0.0	8	0.0	0.0	0.0	8	0.0	0.0	8	0.0	0.0	8	0.0	0.0	8	0.0	0.0
All	47.4	50.0	50.0	NO	56.3	50.0	50.0	YES	40.4	50.0	YES	40.4	50.0	NO	40.4	50.0	50.0	40.4	50.0
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.																			

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PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: MATHEMATICS

Success Academy Charter School - Bronx 3

	2016-17 Grades Served K-4				2017-18 Grades Served K-5				2018-19 Grades Served K-6						
	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET			
1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.	3	95.5 (88)	97.4 (76)		3	100.0 (89)	100.0 (58)		3	98.9 (92)	100.0 (72)				
	4	97.5 (81)	97.2 (72)		4	96.3 (80)	95.9 (73)		4	94.9 (78)	98.6 (72)				
	5	(0)	(0)		5	98.4 (64)	100.0 (55)		5	91.1 (124)	95.1 (41)				
	6	(0)	(0)		6	(0)	(0)		6	98.2 (56)	98.2 (55)				
	7	(0)	(0)		7	(0)	(0)		7	(0)	(0)				
	8	(0)	(0)		8	(0)	(0)		8	(0)	(0)				
	All	96.4 (169)	97.3 (148)	YES	All	98.3 (233)	98.4 (186)	YES	All	95.1 (350)	98.3 (240)	YES			
	Grades	PI	AMO		Grades	PI	MIP		Grades	PI	MIP				
Absolute Measure															
2. Each year the school's aggregate Performance Index on the State exam will meet the Measure of Interim Progress set forth in the State's ESSA accountability system.	3-4	196	109	YES	3-5	241	103	YES	3-6	231	107	YES			
	Comparison: Bronx CSD 8														
3. Each year the percent of students enrolled in at least their second year and performing at or above proficiency will be greater than that of students in the same grades in the local district.	Grades	School	District		Grades	School	District		Grades	School	District				
	3-4	97.3	28.1	YES	3-5	98.4	34.4	YES	3-6	98.3	38.0	YES			
	Comparative Measure														
	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES
	3	92.8	95.5	33.0	2.99	3	83.2	100.0	43.9	2.58	3	83.3	622.0	595.8	2.69
	4	82.5	97.5	30.3	3.40	4	87.6	96.3	35.1	2.91	4	80.5	621.0	595.7	2.41
	5					5	80.0	98.4	33.2	3.54	5	85.0	619.0	594.7	2.32
	6					6					6	75.5	623.0	596.6	2.84
7					7					7					
8					8					8					
All	87.9	96.4	31.7	3.19	All	83.8	98.3	38.0	2.96	All	82.0	620.9	595.5	2.52	
Grades	School	State			Grades	School	State			Grades	School	State			
4	50.1	50.0	50.0	YES	4	59.9	50.0	50.0	YES	4	39.8	50.0	50.0	NO	
5	0.0	50.0	50.0	YES	5	62.6	50.0	50.0	YES	5	31.6	50.0	50.0	NO	
6	0.0	50.0	50.0	YES	6	0.0	50.0	50.0	YES	6	37.7	50.0	50.0	NO	
7	0.0	50.0	50.0	YES	7	0.0	50.0	50.0	YES	7	0.0	50.0	50.0	NO	
8	0.0	50.0	50.0	YES	8	0.0	50.0	50.0	YES	8	0.0	50.0	50.0	NO	
All	50.1	50.0	50.0	YES	All	61.1	50.0	50.0	YES	All	35.4	50.0	50.0	NO	
Growth Measure															
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.															

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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

NOTE: Effective 2012-13, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." 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/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 2013-14

	MERGED 2015-16	MERGED 2016-17	MERGED 2017-18	MERGED 2018-19	MERGED 2019-20
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/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Net Assets					
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
ACTIVITIES					
Operating Revenue					
Resident Student Enrollment	4,720,185	5,976,095	7,124,700	9,895,058	16,050,797
Students with Disabilities	199,091	724,132	852,767	1,454,896	2,049,540
Grants and Contracts					
State and local	206,253	(3,744)	-	-	-
Federal - Title and IDEA	226,186	241,868	708,651	953,406	694,706
Federal - Other	-	37,490	22,251	33,333	-
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	-	-	-
Food Service/Child Nutrition Program	-	-	-	-	-
Total Operating Revenue	5,351,715	6,975,841	8,708,369	12,336,693	18,795,044
Expenses					
Regular Education	4,619,633	5,591,168	6,346,461	7,023,320	9,125,554
SPED	629,950	762,432	2,347,321	2,868,680	3,727,339
Other	-	-	-	-	-
Total Program Services	5,249,583	6,353,600	8,693,782	9,892,000	12,852,893
Management and General	423,693	575,138	779,058	943,021	1,351,789
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	5,673,276	6,928,738	9,472,840	10,835,021	14,204,682
Surplus / (Deficit) From School Operations	(321,561)	47,103	(764,471)	1,501,672	4,590,362
Support and Other Revenue					
Contributions	26,715	34,782	15,716	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	12,305	27,454	33,314	16,105	30,885
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	39,020	62,236	49,030	16,105	30,885
Total Unrestricted Revenue	5,390,735	7,038,077	8,757,399	12,352,798	18,825,929
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	5,390,735	7,038,077	8,757,399	12,352,798	18,825,929
Change in Net Assets	(282,541)	109,339	(715,441)	1,517,777	4,621,247
Net Assets - Beginning of Year - GRAPH 2	338,612	56,071	165,409	(380,192)	1,137,584
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	56,071	165,410	(550,032)	1,137,584	5,758,831

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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

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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

2015-16	2016-17	2017-18	2018-19	2019-20
700,470	708,116	738,520	1,233,508	1,832,799
1,910,373	2,549,216	3,175,634	3,603,778	5,354,647
-	-	-	-	-
-	-	-	-	-
2,610,843	3,257,332	3,914,154	4,837,286	7,187,445
527,558	625,716	769,364	976,300	1,215,863
57,503	73,691	84,988	106,998	170,511
677,336	869,103	1,041,375	1,439,566	2,385,557
-	-	14,602	-	-
113,621	71,333	175,270	97,637	111,396
45,072	40,099	23,976	1,839	37,667
99,683	176,314	296,040	111,091	175,458
409,336	375,252	835,585	800,491	617,369
479,158	475,486	570,330	813,636	1,036,600
653,166	964,414	1,747,158	1,650,177	1,266,816
5,673,276	6,928,740	9,472,841	10,835,021	14,204,682

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)

2015-16	2016-17	2017-18	2018-19	2019-20
380	510	675	576	647
380	510	675	576	1,081
323	412	472	612	985
K-3	K-4	K-5	K-6	K-7
-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

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

13,877	13,877	14,527	15,307	16,150
2.5%	0.0%	4.5%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue

Operating
Other Revenue and Support
TOTAL - GRAPH 3

16,569	16,932	18,450	20,158	19,086
121	151	104	26	31
16,690	17,083	18,554	20,184	19,117

Expenses

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

16,253	15,421	18,419	16,163	13,052
1,312	1,396	1,651	1,541	1,373
17,564	16,817	20,070	17,704	14,425
92.5%	91.7%	91.8%	91.3%	90.5%
7.5%	8.3%	8.2%	8.7%	9.5%
-5.0%	1.6%	-7.6%	14.0%	32.5%

Student to Faculty Ratio

3.3	11.4	11.0	9.9	10.0
-----	------	------	-----	------

Faculty to Admin Ratio

2.7	3.6	4.3	3.7	5.0
-----	-----	-----	-----	-----

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	0.0	0.0
N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

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

0	0	0	0	0
0.0%	0.0%	0.0%	0.0%	0.0%
0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

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

0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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.)

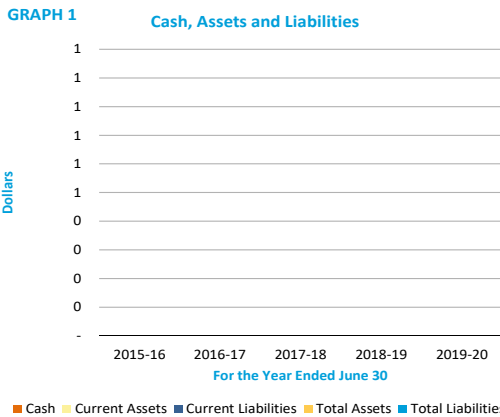
0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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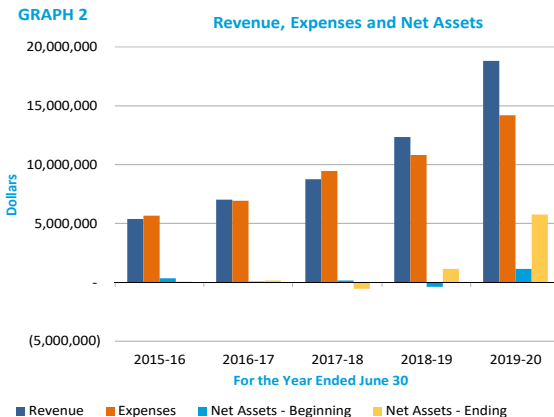
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

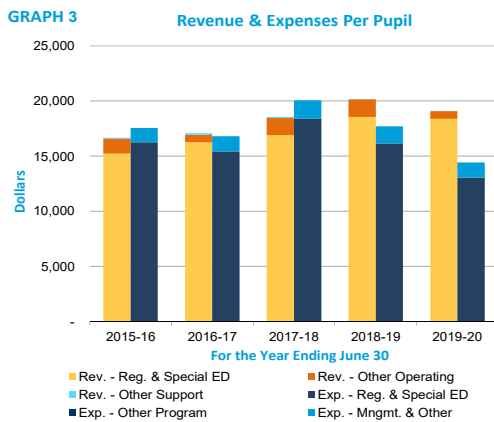
NOTE: Effective 2012-13, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.



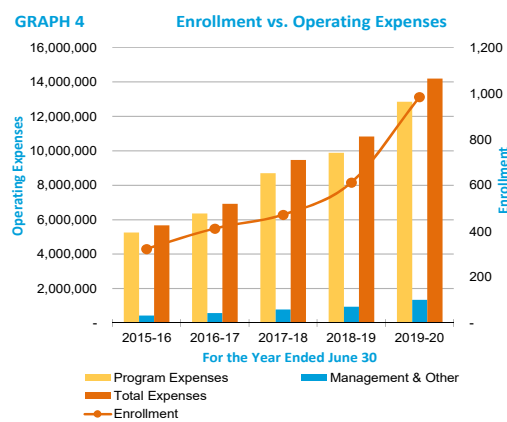
This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 through 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally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



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



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



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

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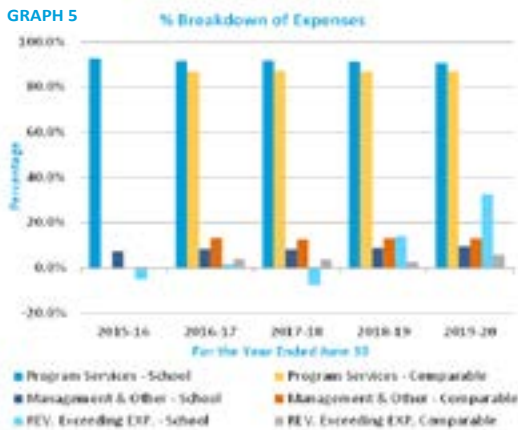
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - BRONX 3

NOTE: Effective 2012-13, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.

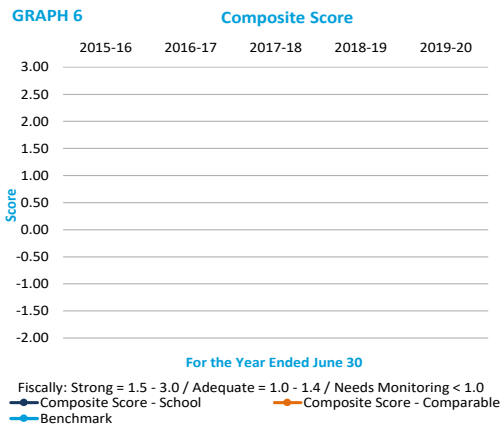
Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)

GRAPH 5



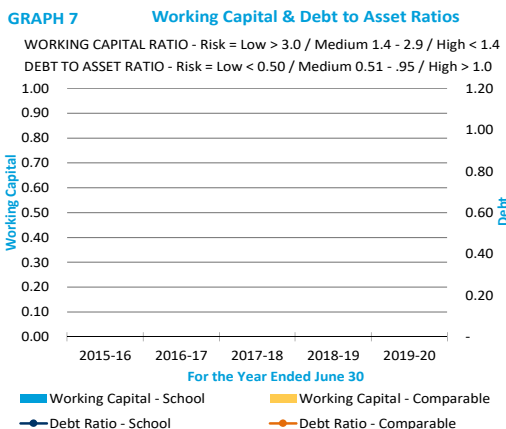
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding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

GRAPH 6



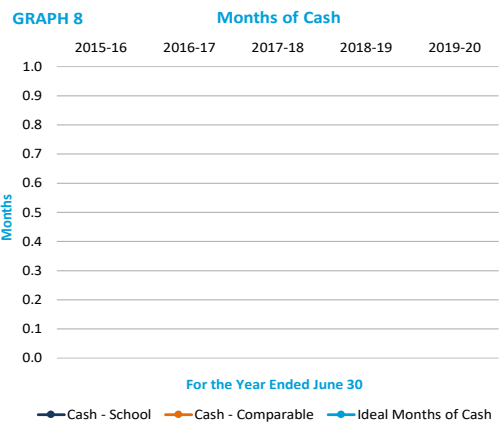
This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid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

GRAPH 7



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

GRAPH 8



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

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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?

Success Bronx 3 is an academic success. The school operates as an effective and viable organization, and the education corporation is fiscally sound. SACS-NYC plans to continue to operate the school in the same manner, making its plans for the school's future sound.

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. Success Bronx 3 plans to continue to implement the same core elements of its educational program that enabled the school to meet or exceed its key Accountability Plan goals in the current charter term. These elements are likely to enable the school to meet or exceed its academic goals in the next charter term.

Fiscal & Facility Plans. Based on evidence collected through the renewal review, including a review of the five year financial plan, SACS – NYC presents a reasonable and appropriate fiscal plan for the school for the next charter term including school budgets that are feasible and achievable. Success Bronx 3 plans to continue instruction for the elementary and middle grades in their NYCDOE co-located sites for the next charter term. The education corporation will request NYCDOE facility space for its high school program.

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.

SUCCESS BRONX 3		
	CURRENT	END OF NEXT CHARTER TERM
Enrollment	1,273	2,148
Grade Span	K-8	K-12
Teaching Staff	97	174
Days of Instruction	183	183

Success Academy Charter School – Harlem 1

So

SCHOOL OVERVIEW

PAGES: 80-98

SO

SCHOOL
OVERVIEW

PS

PERFORMANCE
SUMMARIES

FD

FISCAL DASHBOARD

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FUTURE PLANS

SUCCESS ACADEMY CHARTER SCHOOL – HARLEM 1

DOES THE SCHOOL IMPLEMENT THE EDUCATIONAL PROGRAM WITH FIDELITY TO THE EDUCATION CORPORATION'S DESIGN?

Based on a review of the school's Application for Charter Renewal, discussions with teachers, leaders and SACS-NYC board members during the charter term, and a review of the academic program, Success Academy Charter School – Harlem 1 fully implements the academic program as outlined in the education corporation overview and is an academic success having met its key Accountability Plan goals.

SCHOOL BACKGROUND

The Board of Regents approved the original charter for Success Harlem 1 on January 10, 2006. The school opened its doors in the fall of 2006 initially serving 156 students in Kindergarten and 1st grade. The SUNY Trustees granted approval for Success Harlem 1 to merge into a SUNY authorized education corporation, the predecessor to SACS-NYC, on April 24, 2012. The school is authorized to serve 1,751 students in Kindergarten – 12th grade during the 2020-21 school year. If renewed, the school will continue to serve students in Kindergarten – 12th grade with a projected total enrollment of 1,938 students.

The current charter term expires on July 31, 2021. A subsequent charter term would enable the school to operate through July 31, 2026. Success Harlem 1's Kindergarten – 4th grades are co-located at 34 West 118th Street, 2nd Floor, New York, New York in CSD 3. The school also houses P.S. 149 Sojourner Truth, which serves pre-Kindergarten – 8th grade. The 5th – 8th grade program is co-located at 215 West 114th Street, 5th Floor, New York, New York, also in CSD 3. This building also houses Wadleigh Secondary School for the Performing and Visual Arts, a 6th – 12th grade NYCDOE school. The high school grades are co-located at 111 East 33rd Street, 4th Floor, New York, New York, in CSD 2. The school shares space with Manhattan Academy for Arts and Language, a 9th – 12th grade NYCDOE school.

NOTEWORTHY - SUCCESS HARLEM 1

Students at Success-Harlem 1 take a variety of exams to demonstrate college preparation. In 2018-19, 54% of the graduating class passed at least two different AP exams with a score of 3 or higher.

ACADEMIC PROGRAM

As part of SACS-NYC's key academic initiatives, Success Harlem 1's elementary grades effectively maintain high student engagement and comprehensive literacy based instruction for scholars. To embrace the challenges of remote instruction, teachers develop strategies to keep students highly engaged. The school leverages features within Zoom to facilitate high levels of student engagement. In a Kindergarten lesson on phonics, the teacher facilitated an engaging lesson by giving students live, frequent, and continuous feedback to encourage them to think independently and create opportunities for them to interact with one another using Zoom's reaction features. The teacher asked students to touch their hands, eyes, and ears to refocus the group, hold fingers up to indicate how many sounds they hear even when it is not their turn to answer, and consistently praised engaged behavior throughout the lesson. The school continues its guided reading small group learning through Zoom breakout rooms, and students internalize norms and standards for participation resulting in high levels of student to student discussion.

At the middle school level, leaders maintain the scholar talent program to provide specials classes to students and believe that continuing this aspect of the school's program allows students to socialize and interact with one another outside of core content areas. The school offers art, drama, chess, fitness, and debate. The debate class works closely with students to build content knowledge on particular topics and develop skills for debating. In addition to leading students to debate competitions, the debate teacher also leads professional development sessions for classroom teachers to infuse debate strategies and tactics into core content areas so that students learn skills to defend and argue points in the academic setting.

The Success Harlem 1 high school program continued to prioritize rigorous, intellectual discussions during class time and high expectations through the transition into fully remote instruction. Instructional leaders modified their expectations for classroom participation to include different modalities such as text chat between students or between the student and teacher. Teachers leverage these chats as well as virtual small groups to facilitate robust discussion of academic material based on students' heavy homework load. In order to prepare students for the rigors and expectations of participation in the synchronous instruction at the beginning of the year, the school requires substantial summer work. Students entering into a course such as AP Calculus are required to complete introductory material before classes begin.

Leaders and teachers also prioritize facilitating a strong sense of community in the remote setting to ensure that the academic culture at the school is safe and collegial as well as challenging. Students participate in weekly advisory sessions composed of peers from all

grade levels. In addition to competitions across advisories, teachers deliver non-academic lessons designed to foster a shared culture and understand and address challenges related to virtual instruction. During typical lessons, leaders may observe instruction and provide seamless coaching using the school's technology platforms with a focus on improving student participation and engagement with peers. Teachers value the efficient delivery of hands-on support from leaders and enjoy flexibility to nurture classroom culture based on their deep knowledge of their students.

LEGAL REQUIREMENTS

Success Harlem 1 substantially complies with applicable laws, rules and regulations, and provisions of the charter.

Complaints. The Institute did not receive any formal complaints regarding this school during the charter term.

Teacher Certification. At the time of the renewal review, Success Harlem 1 remained substantially out of compliance regarding teacher certification. The Institute will continue to work with the education corporation and network to monitor the implementation of the certification plan.

FINANCIAL CONDITION

Success Harlem 1's projected five year budget reflects anticipated stable revenues and expenses associated with the planned enrollment. The school requested enrollment revisions for 2017-18 to 2020-21. After two years of the school's actual enrollment being on or around the allowable 20% below chartered enrollment, the school showed improved enrollment in the 2019-20 school year. SACS – NYC is confident that all of the school's academies will have the opportunity to remain in their current spaces for the full course of the next charter term.

Success Harlem 1 opened in 2006-07 and merged with the other SACS – NYC schools on July 1, 2012. The school has consistently reported operating deficits which were offset against accumulated operating surpluses of the merged education corporation. The net assets of the school as of June 30, 2020 were (\$14M). This large deficit reflects the cost of the school's high school program, which is historically expensive to run. The deficit is offset by the accumulated surpluses of the entire education corporation.

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SCHOOL OVERVIEW

K-4 SCHOOL LEADERS

Aaron Marcus (2020 to Present)
Sheila Palmer (2019-20)
Danique Loving (2013-14 to 2018-19)
Jacqueline Albers (2011-12 to 2012-13)

5-8 SCHOOL LEADERS

Amaury Ramirez (2020 to Present)
Khari Shabazz (2016-17 to 2019-20)
Megan Perry (2015-16)
Andrea Klein (2011-12 to 2014-15)

9-12 SCHOOL LEADERS

Michael LaFrancis (2018-19 to Present)
Andrew Malone (2015-16 to 2017-18)
Marc Meyer (2014-15)

SCHOOL CHARACTERISTICS - SUCCESS HARLEM 1

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2016-17	1,022	1,100	108%	K-11
2017-18	1,317	1,065	81%	K-12
2018-19	1,393	1,105	79%	K-12
2019-20	1,436	1,255	87%	K-12
2020-21	1,751	1,359	78%	K-12

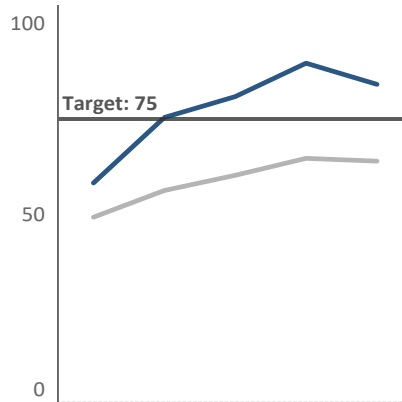
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SCHOOL OVERVIEW

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

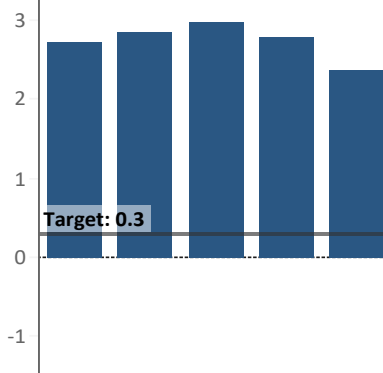
ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

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



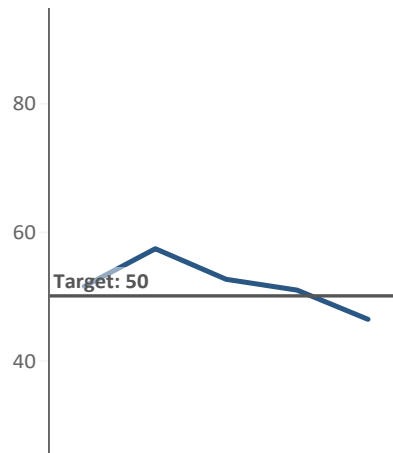
Test Year	Comp Grades	District %	School %
2015	3-8	49	58
2016	3-8	56	76
2017	3-8	60	81
2018	3-8	65	90
2019	3-8	64	84

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



Test Year	Test Grades	Effect Size
2015	3-8	2.71
2016	3-8	2.85
2017	3-8	2.98
2018	3-8	2.78
2019	3-8	2.35

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



Test Year	School Mean Growth
2015	51.7
2016	57.6
2017	52.8
2018	51.1
2019	46.5

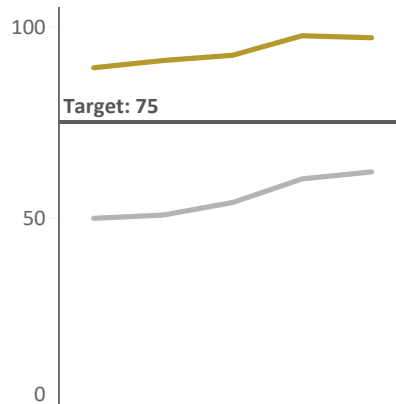
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SCHOOL OVERVIEW

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

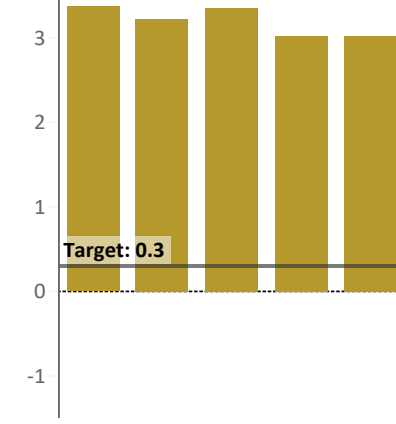
MATHEMATICS ACCOUNTABILITY PLAN GOAL

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



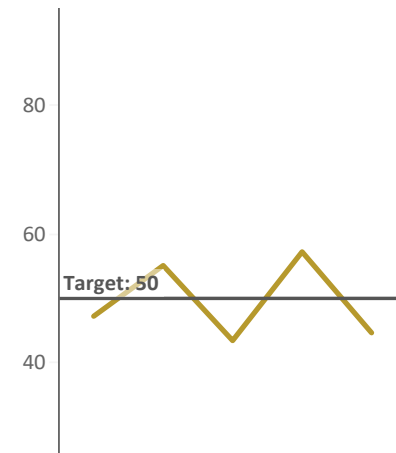
Test Year	Comp Grades	District %	School %
2015	3-8	50	89
2016	3-8	51	91
2017	3-8	54	93
2018	3-7	60	98
2019	3-7	62	97

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



Test Year	Test Grades	Effect Size
2015	3-8	3.38
2016	3-8	3.23
2017	3-8	3.36
2018	3-7	3.04
2019	3-7	3.02

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



Test Year	School Mean Growth
2015	47.3
2016	55.2
2017	43.5
2018	57.3
2019	44.7

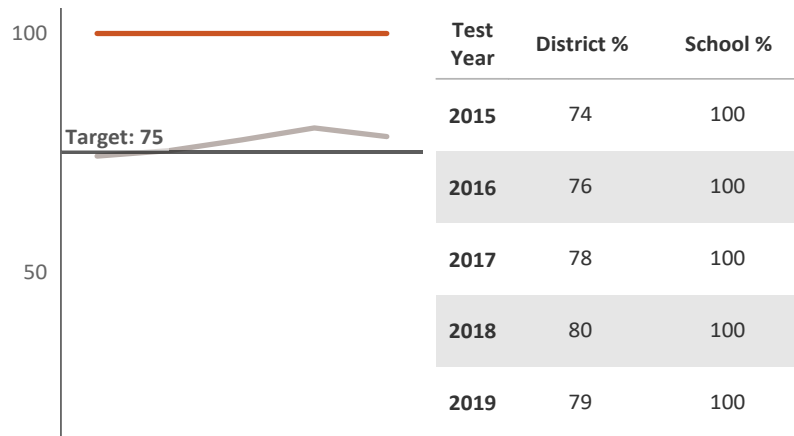
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SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

SCIENCE ACCOUNTABILITY PLAN GOAL

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



SPECIAL POPULATIONS PERFORMANCE

	2017	2018	2019
Enrollment Receiving Mandated Academic Services	189	198	172
Tested on State Exam	114	108	73
School Percent Proficient on ELA Exam	63.2	74.1	61.6
District Percent Proficient	25.1	29.3	31.8
	2017	2018	2019
ELL Enrollment	35	30	21
Tested on NYSESLAT Exam	31	30	21
School Percent 'Commanding' or Making Progress on NYSESLAT	32.3	26.7	9.5

The academic outcome data about the performance of students receiving special education services and ELLs above is not tied to separate goals in the school's formal Accountability Plan.

The NYSESLAT, the New York State English as a Second Language Achievement Test, is a standardized state exam.

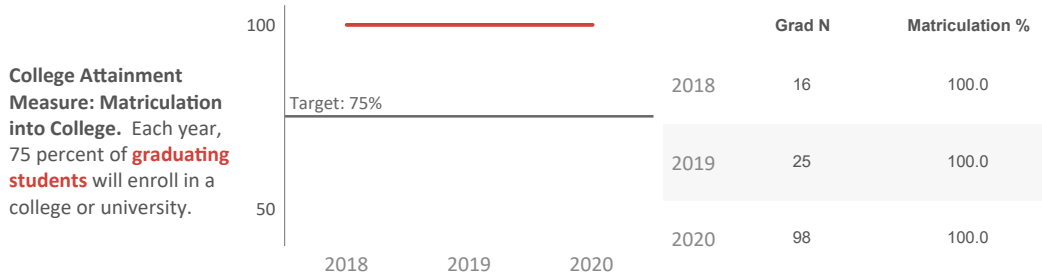
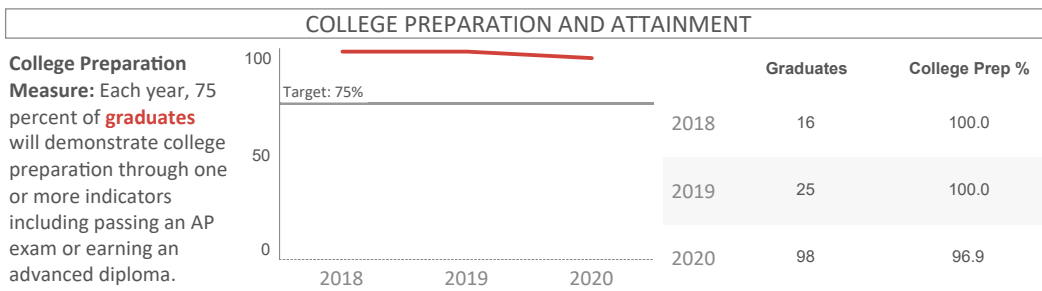
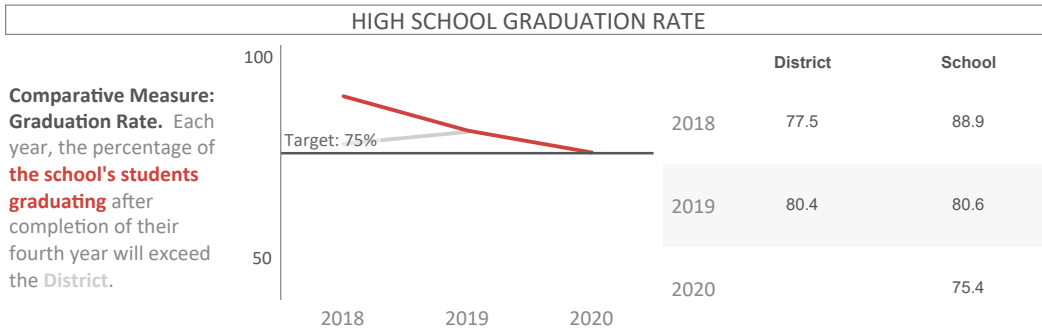
"Making Progress" is defined as moving up at least one level of proficiency. Student scores fall into five categories/proficiency levels: Entering; Emerging; Transitioning; Expanding; and, Commanding.

In order to comply with Family Educational Rights and Privacy Act regulations on reporting education outcome data, the Institute does not report assessment results for groups containing five or fewer students and indicates this with an "s."

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SCHOOL OVERVIEW

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1



ENGLISH LANGUAGE ARTS AND MATHEMATICS

Comparative and Absolute Measure: District Comparison. Each year, the school's **ELA Accountability Performance Index** and the **math PI** will exceed the district's PI and the state's MIP.*

N/A

*The state does not calculate performance indices for cohorts that enroll less than 30 students. As such, the ELA and mathematics PIs are not reported here.







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SCHOOL OVERVIEW

SUMMARY OF PUBLIC COMMENTS

The NYCDOE jointly held its required hearing on Success Harlem 1's and Success BedStuy 3's renewal applications on October 8, 2020 by videoconference. Forty-three people were present, but no one spoke during the hearing.

ENROLLMENT AND RETENTION

Success Academy Charter School - Harlem 1's Enrollment and Retention Status: 2019-20			Target	School
enrollment	economically disadvantaged		56.2	83.0
	English language learners		6.7	2.0
	students with disabilities		14.9	10.9
retention	economically disadvantaged		91.4	86.9
	English language learners		90.7	92.3
	students with disabilities		91.6	89.0

SCHOOL PERFORMANCE SUMMARY: ENGLISH LANGUAGE ARTS

Success Academy Charter School - Harlem 1

	2016-17 Grades Served K-11				2017-18 Grades Served K-12				2018-19 Grades Served K-12						
	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET			
1. Each year 75 percent of students who are enrolled in at least their second year will perform at or above proficiency on the New York State exam.	3	87.0 (123)	89.3 (103)		3	96.1 (103)	95.8 (96)		3	94.0 (83)	93.1 (72)				
	4	88.5 (113)	88.6 (105)		4	89.4 (113)	89.1 (110)		4	84.0 (100)	85.4 (89)				
	5	64.4 (73)	62.9 (70)		5	72.1 (86)	73.9 (46)		5	76.1 (88)	64.9 (37)				
	6	59.5 (79)	59.2 (76)		6	86.3 (73)	91.8 (61)		6	82.5 (80)	83.3 (78)				
	7	84.1 (107)	84.6 (104)		7	81.8 (66)	81.8 (66)		7	77.8 (63)	77.8 (63)				
	8	92.6 (81)	92.6 (81)		8	98.7 (78)	98.7 (77)		8	94.0 (50)	94.0 (50)				
	All	80.9 (576)	81.1 (539)	YES	All	87.9 (519)	89.9 (456)	YES	All	84.3 (464)	84.3 (389)	YES			
	Absolute Measure														
	2. Each year the school's aggregate Performance Index on the State exam will meet the state Measure of Interim Progress set forth in the State's ESSA accountability system.	Grades	PI	AMO		Grades	PI	MIP		Grades	PI	MIP			
3-8		179	111	YES	3-8	204	101	YES	3-8	202	105	YES			
3. Each year the percent of students enrolled in at least their second year and performing at or above proficiency will be greater than that of students in the same grades in the local district.	Comparison: Manhattan CSD 3														
	Grades	School	District		Grades	School	District		Grades	School	District				
	3-8	81.1	60.3	YES	3-8	89.9	64.8	YES	3-8	84.3	64.0	YES			
	Comparative Measure														
	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES
	3	87.3	87.0	30.2	3.18	3	79.8	96.1	42.4	2.97	3	86.6	618.0	595.2	2.61
	4	82.2	88.5	30.2	3.19	4	81.8	89.4	38.8	2.62	4	81.4	613.0	594.6	2.20
	5	85.9	64.0	23.1	2.66	5	76.0	72.1	29.8	2.61	5	78.6	615.0	595.7	2.50
	6	81.5	59.5	21.5	2.54	6	74.7	86.3	41.7	2.57	6	80.7	611.0	593.1	2.08
7	85.3	84.1	28.5	3.03	7	85.0	81.8	28.6	3.10	7	84.1	613.0	594.8	2.12	
8	74.4	92.6	37.7	2.99	8	76.3	98.7	40.7	2.86	8	87.1	617.0	595.1	2.70	
All	83.1	80.9	28.8	2.98	All	79.0	87.9	37.4	2.78	All	82.7	614.4	594.7	2.35	
Comparison: Manhattan CSD 3															
Grades	School	State		Grades	School	State		Grades	School	State					
4	59.4	50.0	YES	4	53.8	50.0	YES	4	50.1	50.0	NO				
5	48.8	50.0	YES	5	48.1	50.0	YES	5	39.7	50.0	NO				
6	44.4	50.0	YES	6	44.1	50.0	YES	6	40.0	50.0	NO				
7	54.4	50.0	YES	7	52.5	50.0	YES	7	49.3	50.0	NO				
8	52.4	50.0	YES	8	55.6	50.0	YES	8	57.8	50.0	NO				
All	52.8	50.0	YES	All	51.1	50.0	YES	All	46.5	50.0	NO				
Growth Measure															
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.															

PERFORMANCE SUMMARIES

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SCHOOL PERFORMANCE SUMMARY: MATHEMATICS

Success Academy Charter School - Harlem 1

	2016-17 Grades Served K-11				2017-18 Grades Served K-12				2018-19 Grades Served K-12						
	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET	Grades	All % (N)	2+ Years % (N)	MET			
1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam. 2. Each year the school's aggregate Performance Index on the State exam will meet the Measure of Interim Progress set forth in the State's ESSA accountability system.	3	98.4 (123)	100.0 (103)		3	98.1 (103)	97.9 (96)		3	100.0 (83)	100.0 (72)				
	4	92.0 (113)	91.4 (105)		4	98.2 (113)	98.2 (110)		4	94.0 (100)	94.4 (89)				
	5	94.5 (73)	94.3 (70)		5	96.4 (84)	95.6 (45)		5	98.9 (88)	100.0 (37)				
	6	89.9 (79)	89.5 (76)		6	100.0 (73)	100.0 (61)		6	95.1 (81)	94.9 (79)				
	7	86.9 (107)	86.5 (104)		7	97.0 (66)	97.0 (66)		7	100.0 (63)	100.0 (63)				
	8	95.1 (81)	95.1 (81)		8	(0)	(0)		8	(0)	(0)				
	All	92.9 (576)	92.8 (539)	YES	All	97.9 (439)	97.9 (378)	YES	All	97.3 (415)	97.4 (340)	YES			
	Grades	PI	AMO		Grades	PI	MIP		Grades	PI	MIP				
	3-8	191	109	YES	3-7	239	103	YES	3-7	237	107	YES			
3. Each year the percent of students enrolled in at least their second year and performing at or above proficiency will be greater than that of students in the same grades in the local district.	Comparison: Manhattan CSD 3				Comparison: Manhattan CSD 3				Comparison: Manhattan CSD 3						
	Grades	School	District		Grades	School	District		Grades	School	District				
	3-8	92.8	54.2	YES	3-7	97.9	60.4	YES	3-7	97.4	62.2	YES			
	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES
	3	87.3	98.4	35.4	3.01	3	79.8	98.1	45.3	2.55	3	86.6	625.0	595.2	3.06
	4	82.2	92.0	30.5	3.12	4	81.8	98.2	37.8	2.88	4	81.4	624.0	595.5	2.71
	5	85.9	95.0	28.0	3.55	5	76.0	96.4	35.2	3.33	5	78.6	633.0	596.0	3.77
	6	81.5	89.9	25.8	3.26	6	74.7	100.0	36.0	3.40	6	80.7	620.0	595.4	2.65
	7	85.3	86.9	20.8	3.27	7	85.0	97.0	26.8	3.31	7	84.1	625.0	595.0	2.89
8	74.4	95.1	15.3	4.30	8					8					
All	83.1	92.9	26.7	3.36	YES	79.5	97.9	37.1	3.04	YES	82.1	625.5	595.4	3.02	YES
Grades	School	State		Grades	School	State		Grades	School	State					
4	69.8			4	62.1			4	44.0						
5	34.5			5	43.2			5	52.1						
6	29.1			6	60.1			6	36.9						
7	37.2			7	64.6			7	44.9						
8	35.1			8	0.0			8	0.0						
All	43.5	50.0	NO	All	57.3	50.0	YES	All	44.7	50.0	NO				
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.	Comparison: Manhattan CSD 3				Comparison: Manhattan CSD 3				Comparison: Manhattan CSD 3						
	Grades	School	State		Grades	School	State		Grades	School	State				
	4	69.8			4	62.1			4	44.0					
	5	34.5			5	43.2			5	52.1					
	6	29.1			6	60.1			6	36.9					
	7	37.2			7	64.6			7	44.9					
	8	35.1			8	0.0			8	0.0					
	All	43.5	50.0	NO	All	57.3	50.0	YES	All	44.7	50.0	NO			

PERFORMANCE SUMMARIES

Pf
PERFORMANCE

Su
SUMMARIES

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PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: Success Academy Charter School - Harlem 1

High School Graduation

	2017-18		2018-19		2019-20	
	MET		MET		MET	
1. Each year, 75 percent of students in the third-year high school Total Graduation Cohort will score at or above proficiency on at least three different alternative exams required for graduation.	2016 Cohort N 31	% Passing ≥ 3 Regents 90.3	2017 Cohort N 115	% Passing ≥ 3 Regents 20.9	2018 Cohort N 208	% Passing ≥ 3 Regents 100.0
2. Each year, 75 percent of students in the Total Graduation Cohort will graduate after the completion of their fourth year.	2014 Cohort N 18	% 88.9	2015 Cohort N 31	% 80.6	2016 Cohort N 130	% 75.4
3. Each year, 95 percent of students will graduate after the completion of their fifth year.	2013 Cohort N	% Graduating NA	2014 Cohort N 18	% Graduating 94.4	2015 Cohort N 31	% Graduating 83.9
4. Each year, the percent of students graduating after the completion of their fourth year will exceed that of the local school district.	Comparison School District: CSD 3 School 88.9	District 77.5	Comparison School District: CSD 3 School 80.6	District 80.4	Comparison School District: CSD 3 School 75.4	District NA
		YES		YES		NA

College Preparation

	2017-18		2018-19		2019-20	
	MET		MET		MET	
1. Each year, 75 percent of graduating students will demonstrate their preparation for college by at least one or some combination of indicators of college readiness. ¹	Graduate N 16	% 100.0	Graduate N 25	% 100.0	Graduate N 98	% 96.9
2. Each year, 75 percent of graduating students will matriculate in a college or university in the year after graduation.	Graduate N 16	% 100.0	Graduate N 25	% 100.0	Graduate N 98	% 100.0
3. Each year, the College, Career, and Civic Readiness Index ("CCCRI") for the school's Total Cohort will exceed the state's MIP set forth in the state's ESSA accountability system.	CCCRI NA	MIP 128	CCCRI NA	MIP 130	CCCRI NA	MIP 130
4. Each year, the school's CCCRI for the Total Cohort will exceed that of the district's Total Cohort.	Comparison School District: CSD 3 School NA	District 114	Comparison School District: CSD 3 School NA	District 128	Comparison School District: CSD 3 School NA	District 128
		YES		YES		YES

1. The indicators include, but are not limited to: passing an Advanced Placement exam with a score of 3 or higher, earning a score of 4 or higher on an International Baccalaureate exam, passing a College Level Examination Program exam, passing a college level course, achieving the college and career readiness benchmark on the SAT, earning a Regents diploma with advanced designation.

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PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: Success Academy Charter School - Harlem 1

English Language Arts

	2017-18		2018-19		2019-20	
	MET		MET		MET	
1. Each year, 65 percent of students in the fourth year Accountability Cohort will meet or exceed Common Core expectations (currently scoring at or above Performance Level 4 on the Regents Exam in English Language Arts (Common Core)).	2014 Cohort N	%	2015 Cohort N	%	2016 Cohort N	%
	18	100.0	31	77.4	130	100.0
	YES		YES		YES	
2. Each year, 50 percent of students in the fourth year Accountability Cohort who did not score proficient on the 8 th grade ELA exam will meet or exceed Common Core expectations (scoring at or above Performance Level 4 on the exam).	Low Performing Entrants N	%	Low Performing Entrants N	%	Low Performing Entrants N	%
	NA	NA	NA	NA	NA	NA
3. The percentage of students in the Total Cohort scoring at or above Level 4 on the Regents English exam (or alternative) will exceed the district.	Comparison District: CSD 3		Comparison District: CSD 3		Comparison District: CSD 3	
	School	District	School	District	School	District
	100.0	67.8	77.4	69.1	100.0	NA
	YES		YES		NA	
4. The school's performance index ("PI") in ELA of students in the fourth year of their Accountability Cohort will exceed that of the district.	NA	NA	NA	NA	NA	NA

Mathematics

	2017-18		2018-19		2019-20	
	MET		MET		MET	
1. Each year, 65 percent of students in the fourth year Accountability Cohort will meet or exceed Common Core expectations (currently scoring at or above Performance Level 4 on a Regents Common Core mathematics exam).	2014 Cohort N	%	2015 Cohort N	%	2016 Cohort N	%
	18	35.3	31	80.6	130	100.0
	NO		YES		YES	
2. Each year, 50 percent of students in the fourth year Accountability Cohort who did not score proficient on the 8 th grade math exam will meet or exceed Common Core expectations (scoring at or above Performance Level 4 on the exam).	Low Performing Entrants N	%	Low Performing Entrants N	%	Low Performing Entrants N	%
	NA	NA	NA	NA	NA	NA
3. The percentage of students in the Total Cohort scoring at or above Level 4 on a Regents mathematics exam (or alternative) will exceed the district.	Comparison District: CSD 3		Comparison District: CSD 3		Comparison District: CSD 3	
	School	District	School	District	School	District
	37.5	35.3	80.6	39.2	100.0	NA
	YES		YES		NA	
4. The school's PI in mathematics of students in the fourth year of their Accountability Cohort will exceed that of the district.	NA	NA	NA	NA	NA	NA

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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

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

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 2006-07				
	MERGED	MERGED	MERGED	MERGED	MERGED
	2015-16	2016-17	2017-18	2018-19	2019-20
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/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Net Assets					
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
ACTIVITIES					
Operating Revenue					
Resident Student Enrollment	15,895,740	16,113,925	16,250,203	17,760,181	20,502,027
Students with Disabilities	2,208,233	2,585,987	2,530,137	2,271,142	1,425,532
Grants and Contracts					
State and local	182,527	-	-	360,000	-
Federal - Title and IDEA	441,404	454,352	639,881	802,756	573,500
Federal - Other	705,077	498,130	22,251	33,333	-
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	-	-	-
Food Service/Child Nutrition Program	-	203,846	269,923	249,331	-
Total Operating Revenue	19,432,981	19,856,240	19,712,395	21,476,744	22,501,058
Expenses					
Regular Education	18,179,248	20,064,971	17,849,942	17,029,539	16,768,073
SPED	2,478,988	2,736,132	6,602,034	6,955,727	6,848,931
Other	-	-	-	-	-
Total Program Services	20,658,236	22,801,103	24,451,976	23,985,267	23,617,004
Management and General	1,658,267	1,886,493	2,116,310	2,112,402	2,230,183
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	22,316,503	24,687,596	26,568,286	26,097,669	25,847,187
Surplus / (Deficit) From School Operations	(2,883,522)	(4,831,356)	(6,855,891)	(4,620,925)	(3,346,129)
Support and Other Revenue					
Contributions	93,999	92,865	35,461	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	148,177	69,969	53,198	85,816	116,676
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	242,176	162,834	88,659	85,816	116,676
Total Unrestricted Revenue	19,675,157	20,019,074	19,801,054	21,562,560	22,617,735
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	19,675,157	20,019,074	19,801,054	21,562,560	22,617,735
Change in Net Assets	(2,641,346)	(4,668,522)	(6,767,232)	(4,535,109)	(3,229,452)
Net Assets - Beginning of Year - GRAPH 2	7,215,618	4,574,269	(94,253)	(6,422,321)	(10,957,430)
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	4,574,272	(94,253)	(6,861,485)	(10,957,430)	(14,186,882)

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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

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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

2015-16	2016-17	2017-18	2018-19	2019-20
2,739,018	2,525,523	2,716,815	3,222,552	3,383,250
8,917,732	9,596,986	9,988,290	9,414,908	9,884,398
-	-	-	-	-
-	-	-	-	-
11,656,750	12,122,509	12,705,105	12,637,460	13,267,648
2,108,598	2,233,276	2,320,720	2,376,333	2,295,840
264,433	276,203	269,968	269,456	324,815
2,357,720	2,343,322	2,374,273	2,581,621	3,040,298
-	-	32,946	0	384
318,878	327,883	342,645	274,902	222,289
177,114	125,072	53,785	6,115	238,571
224,376	373,808	582,756	305,463	359,840
1,666,996	1,831,525	2,788,970	2,273,981	1,969,116
1,654,765	2,355,386	2,261,834	2,134,968	2,052,852
1,886,873	2,698,618	2,835,282	3,237,369	2,075,534
22,316,503	24,687,601	26,568,286	26,097,669	25,847,187

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)

2015-16	2016-17	2017-18	2018-19	2019-20
976	1,022	1,113	1,145	1,157
976	1,022	1,317	1,393	1,436
985	1,100	1,065	1,105	1,255
K-10	K-11	K-12	K-12	K-12
-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

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

13,877	13,877	14,527	15,307	16,150
2.5%	0.0%	4.5%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue

Operating
Other Revenue and Support
TOTAL - GRAPH 3

20,112	18,051	18,509	19,436	17,929
246	148	83	78	93
20,358	18,199	18,593	19,514	18,022

Expenses

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

20,973	20,728	22,960	21,706	18,818
1,684	1,715	1,987	1,912	1,777
22,656	22,443	24,947	23,618	20,595
92.6%	92.4%	92.0%	91.9%	91.4%
7.4%	7.6%	8.0%	8.1%	8.6%
-10.1%	-18.9%	-25.5%	-17.4%	-12.5%

Student to Faculty Ratio

6.1	8.3	8.5	7.2	7.8
-----	-----	-----	-----	-----

Faculty to Admin Ratio

2.9	3.8	3.7	3.4	2.9
-----	-----	-----	-----	-----

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	0.0	0.0
N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

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

0	0	0	0	0
0.0%	0.0%	0.0%	0.0%	0.0%
0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

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

0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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.)

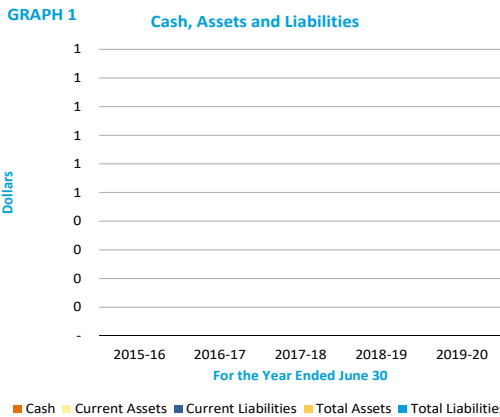
0.0	0.0	0.0	0.0	0.0
N/A	N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A	N/A

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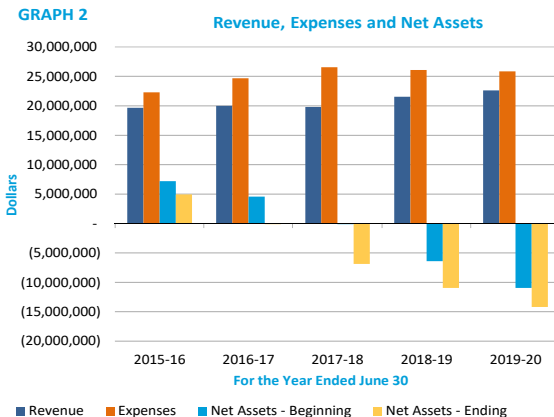
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

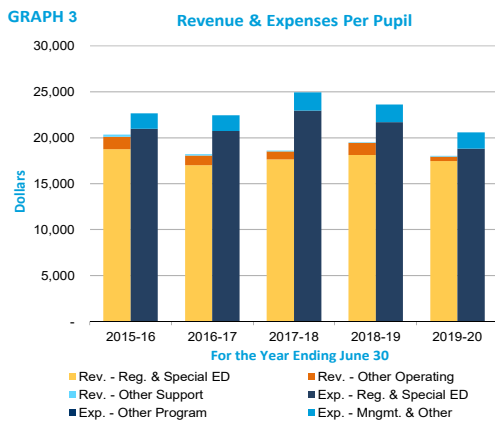
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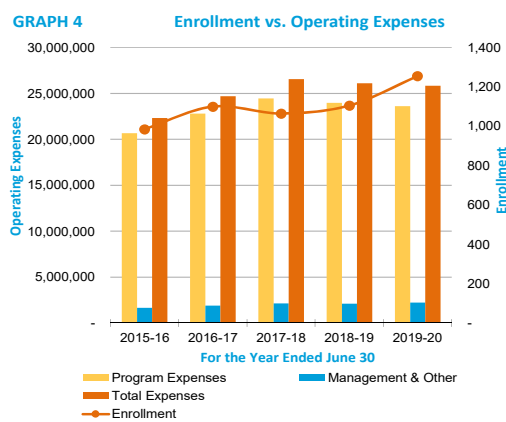
This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 through 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally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



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



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



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

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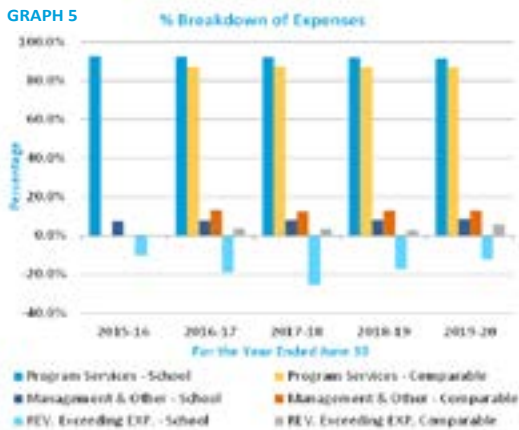
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 1

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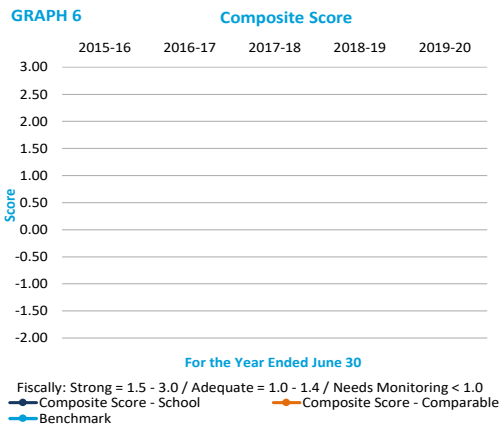
Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)

GRAPH 5



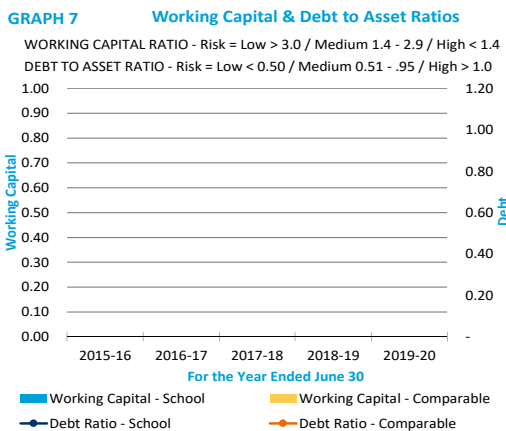
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding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

GRAPH 6



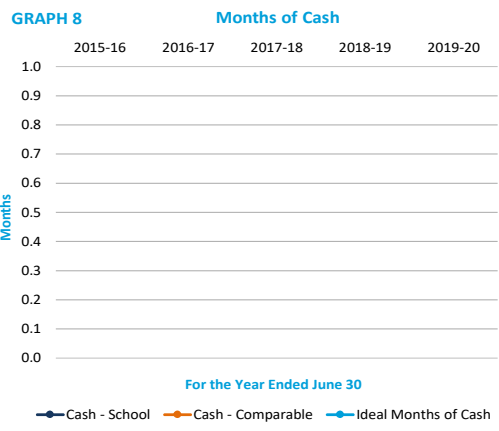
This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid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

GRAPH 7



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

GRAPH 8



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

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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?

Success Harlem 1 is an academic success. The school operates as an effective and viable organization, and the education corporation is fiscally sound. SACS-NYC plans to continue to operate the school in the same manner, making its plans for the school's future sound.

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. SACS-NYC has requested the authority to amend its high school program and issue a high school diploma representing its college preparation program's high rigor in place of a Regents diploma. The Institute's analysis of the program's course offerings and academic requirements confirmed the educational soundness and academic rigor of the program, which will result in a specialized diploma. The SACS-NYC program requires students to complete more testing on Advanced Placement exams in lieu of the Regents exams and requires more intensive coursework such as statistics, calculus, and physics. In addition, the program works in collaboration with Harvard University to offer AP Art History. The high school program and specialized diploma will continue to support Success Harlem 1's college preparatory mission.

Plans for the Educational Program. Success Harlem 1 plans to continue to implement the same core elements of its educational program that enabled the school to meet or exceed its key Accountability Plan goals in the current charter term. These elements are likely to enable the school to meet or exceed its academic goals in the next charter term.

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

SUCCESS HARLEM 1		
	CURRENT	END OF NEXT CHARTER TERM
Enrollment	1,751	1,938
Grade Span	K-12	K-12
Teaching Staff	116	151
Days of Instruction	183	180

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Success Harlem 1 plans to continue instruction for the elementary, middle, and high school grades in their NYCDOE co-located sites for the next charter term.

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.

**Success Academy
Charter School – Harlem 6**

So

SCHOOL OVERVIEW

PAGES: 100-111

SO
SCHOOL
OVERVIEW

PS
PERFORMANCE
SUMMARIES

FD
FISCAL DASHBOARD

FP
FUTURE PLANS

SUCCESS ACADEMY CHARTER SCHOOL – HARLEM 6

DOES THE SCHOOL IMPLEMENT THE EDUCATIONAL PROGRAM WITH FIDELITY TO THE EDUCATION CORPORATION'S DESIGN?

Based on a review of the school's Application for Charter Renewal, discussions with network leaders, and board members during the charter term, and a review of the academic program's track record of meeting its Accountability Plan goals, Success Academy Charter School – Harlem 6 fully implements the academic program as outlined in the education corporation overview and is an academic success, having met its key Accountability Plan goals.

SCHOOL BACKGROUND

The SUNY Trustees approved the original charter for Success Harlem 6 on October 8, 2014. The school opened its doors in the fall of 2017 initially serving 190 students in Kindergarten and 1st grade. The school is authorized to serve 510 students in Kindergarten – 4th grade during the 2020-21 school year. If renewed, the school will grow to serve students in Kindergarten – 8th grade with a projected total enrollment of 727 students.

The current charter term expires on July 31, 2022. A subsequent charter term would enable the school to operate through July 31, 2027. Success Harlem 6 is located at 461 West 131st Street, New York, New York in CSD 5.

NOTEWORTHY - HARLEM 6

In collaboration with the Robertson Center, Success Harlem 6 established a partnership with Basis Charter Schools, a network of charter schools based in Arizona. Success Harlem 6 hosts teachers and leaders from Basis Charter Schools in order to share best practices and improve student outcomes.

ACADEMIC PROGRAM

The Institute's monitoring protocols and assurances from the network confirm that Success Harlem 6 implements SACS-NYC's rigorous, high quality academic program with fidelity to its design, which is the same program found in all SACS-NYC schools that produce high academic achievement as measured by the state exams and the network's internal assessments. Success Harlem 6's results on internal ELA and mathematics assessments provide evidence that the school is on a trajectory to meet its Accountability Plan goals in both the current charter term, and, if renewed, a subsequent charter term.

LEGAL REQUIREMENTS

Success Harlem 6 substantially complies with applicable laws, rules and regulations, and provisions of the charter.

Complaints. The Institute did not receive any formal complaints regarding this school during the charter term.

Teacher Certification. At the time of the renewal review, Success Harlem 6 was moderately out of compliance regarding teacher certification. The Institute will continue to work with the education corporation and network to monitor the implementation of the certification plan.

FINANCIAL CONDITION

Success Harlem 6's projected five year budget reflects anticipated stable revenues and expenses associated with the planned enrollment. The school has been under enrolled by 18-35% in each year during the current charter term. The Institute is working with the school and network to monitor the enrollment situation while the school plans to grow to serve Kindergarten – 8th grade during the next charter term. The network closely monitors the enrollment across the entire education corporation to ensure that the under enrollment of Success Harlem 6 does not adversely affect the education corporation's aggregate actual enrollment goals, and the education corporation's enrollment across all schools closely aligns with the budgeted enrollment. SACS-NYC is confident the school will have the opportunity to remain in its current space for the next charter term.

Success Harlem 6 opened in 2017-18 as part of the SACS-NYC portfolio. The school has reported operating surpluses in each year since the school has opened. The net assets of the school as of June 30, 2020 were \$852,754.

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SCHOOL OVERVIEW

K-4 SCHOOL LEADERS

Emily Reilly (2017-18 to Present)

SCHOOL CHARACTERISTICS - SUCCESS HARLEM 6

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2017-18	190	124	65%	K-2
2018-19	250	206	82%	K-2
2019-20	380	281	74%	K-3
2020-21	510	368	72%	K-4

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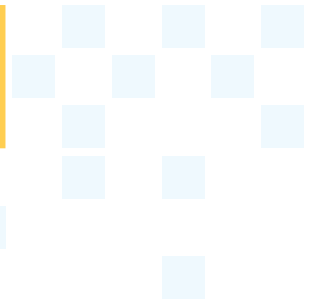
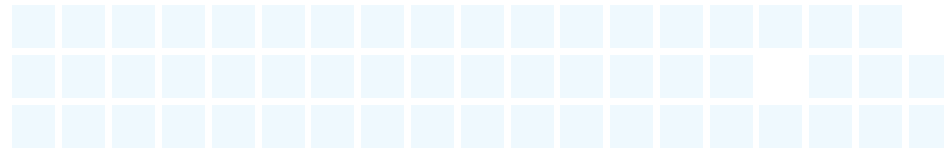
SCHOOL OVERVIEW

NO COMMENTS RECEIVED

ENROLLMENT AND RETENTION

Success Academy Charter School - Harlem 6's Enrollment and Retention Status: 2019-20

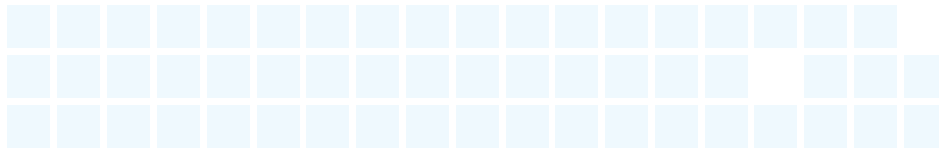
		Target	School
enrollment	economically disadvantaged	54.2	88.0
	English language learners	7.4	7.3
	students with disabilities	17.2	18.3
retention	economically disadvantaged	91.6	79.1
	English language learners	91.8	83.3
	students with disabilities	92.8	96.2



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DATA NOT YET AVAILABLE



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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 6

NOTE: Effective 2017-18, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." 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

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

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 2017-18				
	2015-16	2016-17	MERGED 2017-18	MERGED 2018-19	MERGED 2019-20
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/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Net Assets					
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
ACTIVITIES					
Operating Revenue					
Resident Student Enrollment	-	-	2,025,901	3,345,998	4,585,953
Students with Disabilities	-	-	187,762	446,698	599,219
Grants and Contracts					
State and local	-	-	249,826	-	-
Federal - Title and IDEA	-	-	395,656	386,955	333,646
Federal - Other	-	-	22,251	33,333	-
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	-	-	-
Food Service/Child Nutrition Program	-	-	53,996	128,316	-
Total Operating Revenue	-	-	2,935,392	4,341,301	5,518,818
Expenses					
Regular Education	-	-	1,921,163	2,768,895	3,152,125
SPED	-	-	710,567	1,130,957	1,287,488
Other	-	-	-	-	-
Total Program Services	-	-	2,631,730	3,899,853	4,439,613
Management and General	-	-	220,844	354,024	446,630
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	-	-	2,852,574	4,253,877	4,886,243
Surplus / (Deficit) From School Operations	-	-	82,818	87,424	632,576
Support and Other Revenue					
Contributions	-	-	4,129	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	-	-	8,245	6,340	-
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	-	-	12,374	6,340	-
Total Unrestricted Revenue	-	-	2,947,766	4,347,641	5,518,818
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	-	-	2,947,766	4,347,641	5,518,818
Change in Net Assets	-	-	95,192	93,764	632,576
Net Assets - Beginning of Year - GRAPH 2	-	-	-	126,415	220,179
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	-	-	95,192	220,179	852,754

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FISCAL DASHBOARD

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SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2015-16	2016-17	2017-18	2018-19	2019-20
Personnel Service					
Administrative Staff Personnel	-	-	413,885	519,854	627,548
Instructional Personnel	-	-	758,790	1,518,789	1,833,425
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	-	1,172,675	2,038,642	2,460,974
Fringe Benefits & Payroll Taxes	-	-	239,295	398,033	433,079
Retirement	-	-	32,782	45,870	53,852
Management Company Fees	-	-	296,296	487,337	680,844
Building and Land Rent / Lease	-	-	3,836	-	-
Staff Development	-	-	56,852	47,623	51,526
Professional Fees, Consultant & Purchased Services	-	-	6,814	919	18,956
Marketing / Recruitment	-	-	119,011	41,961	85,595
Student Supplies, Materials & Services	-	-	311,599	250,083	199,788
Depreciation	-	-	159,813	336,529	410,277
Other	-	-	453,600	606,879	491,352
Total Expenses	-	-	2,852,575	4,253,877	4,886,242

SCHOOL ANALYSIS

ENROLLMENT

	2015-16	2016-17	2017-18	2018-19	2019-20
Original Chartered Enrollment	190	250	380	510	675
Final Chartered Enrollment (includes any revisions)	-	-	190	250	380
Actual Enrollment - GRAPH 4	-	-	124	206	281
Chartered Grades	K-1	K-2	K-3	K-4	K-5
Final Chartered Grades (includes any revisions)	Planning Year	Planning Year	K-1	K-2	K-3

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2015-16	2016-17	2017-18	2018-19	2019-20
Increase over prior year	-	-	14,527	15,307	16,150
	0.0%	0.0%	100.0%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue	2015-16	2016-17	2017-18	2018-19	2019-20
Operating	-	-	23,673	21,074	19,636
Other Revenue and Support	-	-	100	31	-
TOTAL - GRAPH 3	-	-	23,772	21,105	19,636
Expenses	2015-16	2016-17	2017-18	2018-19	2019-20
Program Services	-	-	21,224	18,931	15,797
Management and General, Fundraising	-	-	1,781	1,719	1,589
TOTAL - GRAPH 3	-	-	23,005	20,650	17,386
% of Program Services	0.0%	0.0%	92.3%	91.7%	90.9%
% of Management and Other	0.0%	0.0%	7.7%	8.3%	9.1%
% of Revenue Exceeding Expenses - GRAPH 5	0.0%	0.0%	3.3%	2.2%	12.9%

Student to Faculty Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
0.0	-	11.3	8.5	8.4

Faculty to Admin Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
-	-	1.8	3.1	3.6

Financial Responsibility Composite Scores - GRAPH 6

Score	2015-16	2016-17	2017-18	2018-19	2019-20
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	0.0	0.0	0.0	0.0	0.0
	N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

Net Working Capital	2015-16	2016-17	2017-18	2018-19	2019-20
0	0	0	0	0	0
As % of Unrestricted Revenue	0.0%	0.0%	0.0%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

Score	2015-16	2016-17	2017-18	2018-19	2019-20
0.0	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	N/A	N/A	N/A

Debt to Asset Ratio - GRAPH 7

Score	2015-16	2016-17	2017-18	2018-19	2019-20
0.0	0.0	0.0	0.0	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	N/A	N/A	N/A

Months of Cash - GRAPH 8

Score	2015-16	2016-17	2017-18	2018-19	2019-20
0.0	0.0	0.0	0.0	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	N/A	N/A	N/A	N/A

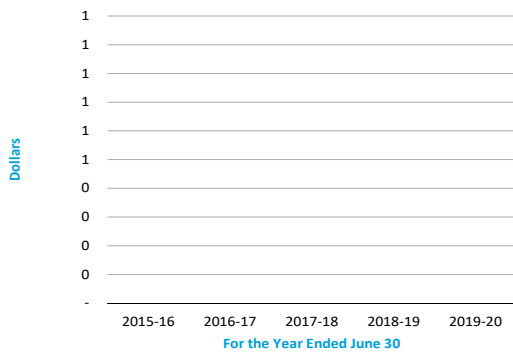
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SUCCESS ACADEMY CHARTER SCHOOL - HARLEM 6

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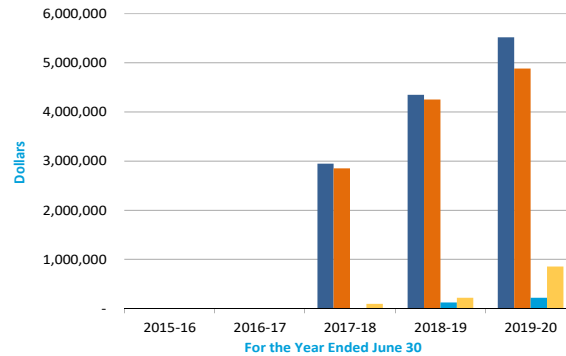
GRAPH 1 Cash, Assets and Liabilities



■ 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.

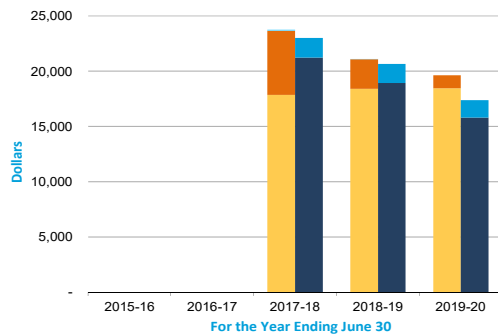
GRAPH 2 Revenue, Expenses and Net Assets



■ 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.

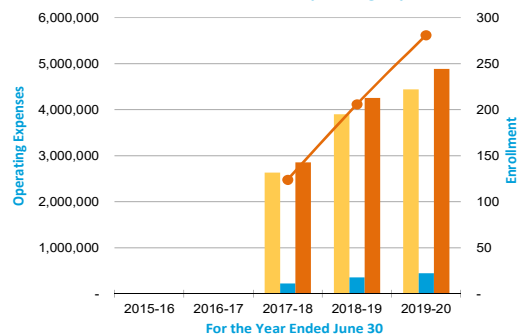
GRAPH 3 Revenue & Expenses Per Pupil



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

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.

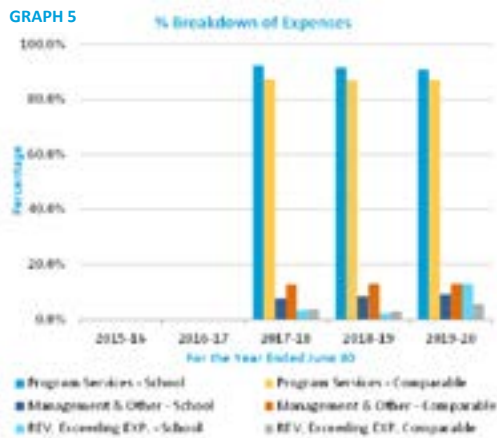
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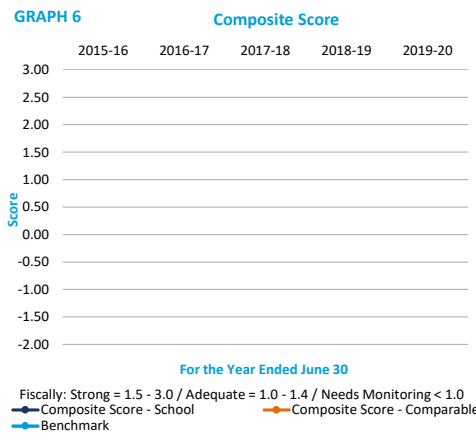
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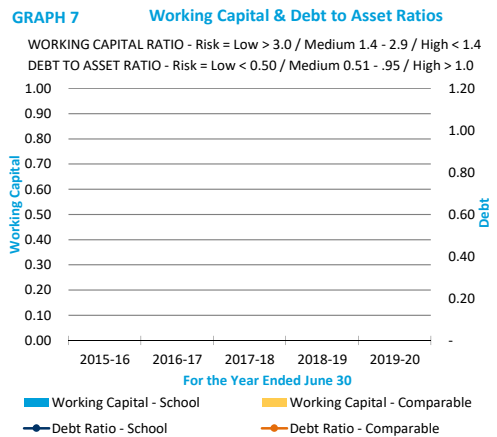
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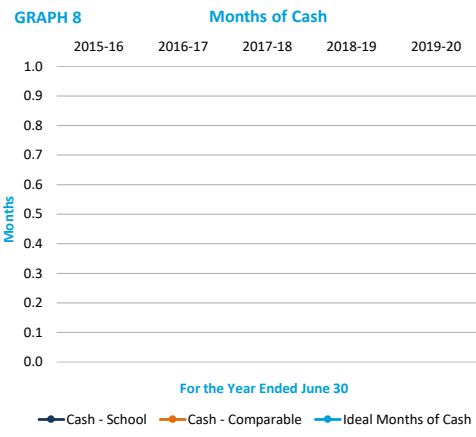
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FUTURE PLANS



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

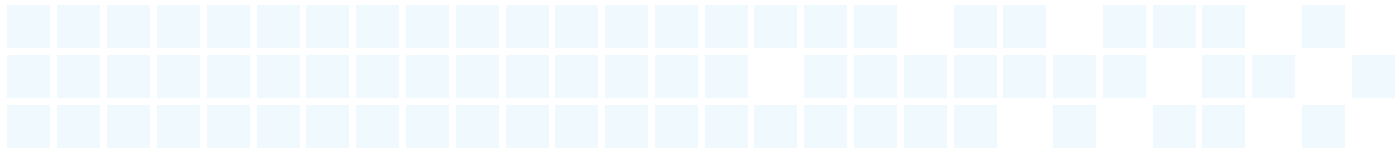
Success Harlem 6 implements the replicated program found in all SACS-NYC schools, which allows each school to demonstrate academic success. The school operates as an effective and viable organization. SACS-NYC plans to continue to operate the school in the same manner, making its plans for the school's future sound.

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. Success Harlem 6 plans to continue to implement the same core elements of its educational program that aligns with the SACS-NYC educational approach across all schools in the education corporation. These core elements allow schools across the education corporation to achieve their Accountability Plan goals year after year. As the school continues its remote learning plan with plans to transition to hybrid learning, leaders are taking necessary steps to collect diagnostic and formative data points throughout the year to assess student need and make any necessary steps to adjust school programming to meet the needs of students and raise student achievement in any future charter term.

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

SUCCESS HARLEM 6		
	CURRENT	END OF NEXT CHARTER TERM
Enrollment	510	727
Grade Span	K-4	K-8
Teaching Staff	35	68
Days of Instruction	183	183



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Success Harlem 6 plans to continue instruction and operation in its current NYCDOE space for the next charter term.

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.



**Success Academy
Charter School – Hudson Yards**

So

SCHOOL OVERVIEW

PAGES: 113-124

SO

SCHOOL
OVERVIEW

PS

PERFORMANCE
SUMMARIES

FD

FISCAL DASHBOARD

FP

FUTURE PLANS

SUCCESS ACADEMY CHARTER SCHOOL – HUDSON YARDS

DOES THE SCHOOL IMPLEMENT THE EDUCATIONAL PROGRAM WITH FIDELITY TO THE EDUCATION CORPORATION'S DESIGN?

Based on a review of the school's Application for Charter Renewal, discussions with network leaders, and SACS-NYC board members during the charter term, and a review of the academic program, Success Academy Charter School – Hudson Yards fully implements the academic program as outlined in the education corporation overview and is an academic success, having met its key Accountability Plan goals.

SCHOOL BACKGROUND

The SUNY Trustees approved the original charter for Success Hudson Yards on October 8, 2014. The school opened its doors in the fall of 2017 initially serving 190 students in Kindergarten and 1st grade. The school is authorized to serve 510 students in Kindergarten – 4th grade during the 2020-21 school year. If renewed, the school will continue to serve students in Kindergarten – 4th grade with a projected total enrollment of 367 students.

The current charter term expires on July 31, 2022. A subsequent charter term would enable the school to operate through July 31, 2027. Success Hudson Yards is located in private space at 500 West 41st Street, New York, New York in CSD 2 and is co-located with Success Union Square's middle school program.

NOTEWORTHY - SUCCESS HUDSON YARDS

SACS-NYC highlights the academic program of Success Hudson Yards as a model school to educators across the country through the network's Robertson Center, which offers high quality professional development experiences free of charge. When in person, the school serves as a model to highlight specific instructional practices.

ACADEMIC PROGRAM

The Institute's monitoring protocols and assurances from the network confirm that Success Hudson Yards implements SACS-NYC's rigorous, high quality academic program with fidelity to its design, which is the same program found in all SACS-NYC schools that produce high academic achievement as measured by the state exams and the network's internal assessments. Success Hudson Yard's results on internal ELA and mathematics assessments provide evidence that the school is on a trajectory to meet its Accountability Plan goals in both the current charter term, and, if renewed, a subsequent charter term.

LEGAL REQUIREMENTS

Success Hudson Yards substantially complies with applicable laws, rules and regulations, and provisions of the charter.

Complaints. The Institute did not receive any formal complaints regarding this school during the charter term.

Teacher Certification. At the time of the renewal review, Success Hudson Yards was moderately out of compliance regarding teacher certification. The Institute will continue to work with the education corporation and network to monitor the implementation of the certification plan.

FINANCIAL CONDITION

Success Hudson Yard's projected five year budget reflects anticipated revenues and expenses associated with the planned enrollment. The school has been under enrolled by 18-52% in each year since the school opened. The Institute is working with the school and network to monitor the enrollment situation. The network closely monitors the enrollment across the entire education corporation to ensure that the under enrollment of Success Hudson Yards does not adversely affect the education corporation's aggregate actual enrollment goals, and the education corporation's enrollment across all schools closely align with the budgeted enrollment. SACS-NYC is confident the school will remain in its current space for the next charter term.

Success Hudson Yards opened in 2017-18 as part of the SACS-NYC portfolio. The school has reported both operating surpluses and deficits during the charter term. The deficits have been offset against the surpluses of the merged education corporation. The school's net assets as of June 30, 2020 were (\$1.9M).

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SCHOOL OVERVIEW

K-4 SCHOOL LEADERS

Will Loskoch (2017-18 to Present)

SCHOOL CHARACTERISTICS - SUCCESS HUDSON YARDS







SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2017-18	190	93	48%	K-1
2018-19	250	203	81%	K-2
2019-20	380	298	78%	K-3
2020-21	510	410	80%	K-4

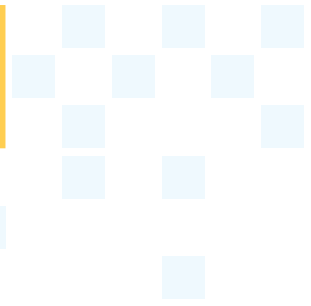
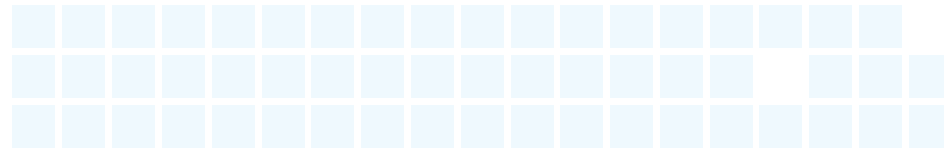
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SCHOOL OVERVIEW

NO COMMENTS RECEIVED

ENROLLMENT AND RETENTION

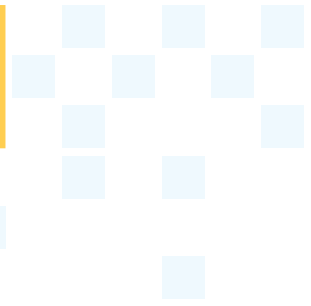
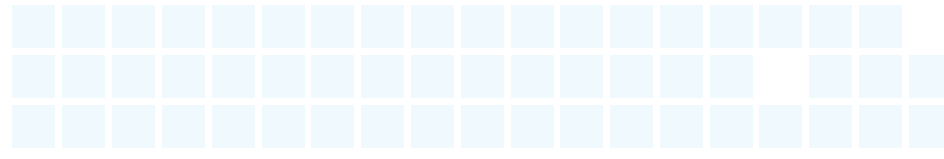
Success Academy Charter School - Hudson Yards's Enrollment and Retention Status: 2019-20			Target	School
enrollment	economically disadvantaged		40.6	60.4
	English language learners		11.8	8.3
	students with disabilities		16.5	20.5
retention	economically disadvantaged		95.2	77.5
	English language learners		93.5	100.0
	students with disabilities		96.0	91.7



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PERFORMANCE SUMMARIES

DATA NOT YET AVAILABLE



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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HUDSON YARDS

NOTE: Effective 2017-18, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." 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/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 2017-18				
	2015-16	2016-17	MERGED 2017-18	MERGED 2018-19	MERGED 2019-20
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/Lease Liability	-	-	-	-	-
All other L-T debt and notes payable, net current maturities	-	-	-	-	-
Total Liabilities - GRAPH 1	-	-	-	-	-
Net Assets					
Without Donor Restrictions	-	-	-	-	-
With Donor Restrictions	-	-	-	-	-
Total Net Assets	-	-	-	-	-
Total Liabilities and Net Assets	-	-	-	-	-
ACTIVITIES					
Operating Revenue					
Resident Student Enrollment	-	-	1,445,040	3,392,128	4,861,162
Students with Disabilities	-	-	114,808	314,275	773,735
Grants and Contracts					
State and local	-	-	231,376	-	-
Federal - Title and IDEA	-	-	471,774	254,741	224,978
Federal - Other	-	-	22,251	(401,667)	-
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	421,306	985,809	1,442,841
Food Service/Child Nutrition Program	-	-	83,915	96,578	-
Total Operating Revenue	-	-	2,790,471	4,641,865	7,302,716
Expenses					
Regular Education	-	-	3,004,591	3,668,161	4,307,646
SPED	-	-	1,111,287	1,498,263	1,759,461
Other	-	-	-	-	-
Total Program Services	-	-	4,115,878	5,166,424	6,067,106
Management and General	-	-	331,669	461,548	593,505
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	-	-	4,447,547	5,627,971	6,660,611
Surplus / (Deficit) From School Operations	-	-	(1,657,076)	(986,106)	642,105
Support and Other Revenue					
Contributions	-	-	3,097	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	-	-	7,754	3,684	-
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	-	-	10,851	3,684	-
Total Unrestricted Revenue	-	-	2,801,322	4,645,549	5,859,875
Total Temporarily Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	-	-	2,801,322	4,645,549	5,859,875
Change in Net Assets	-	-	(1,646,225)	(982,422)	642,105
Net Assets - Beginning of Year - GRAPH 2	-	-	-	(1,622,808)	(2,605,230)
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	-	-	(1,646,225)	(2,605,230)	(1,963,125)

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FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HUDSON YARDS

NOTE: Effective 2017-18, the school merged finances with the education corporation, "Success Academy Charter Schools - NYC." Accordingly, see the education corporation report containing the "Balance Sheet" for all schools merged into the education corporation.

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2015-16	2016-17	2017-18	2018-19	2019-20
Personnel Service					
Administrative Staff Personnel	-	-	362,587	487,254	657,736
Instructional Personnel	-	-	906,467	1,423,545	1,921,620
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	-	1,269,053	1,910,799	2,579,355
Fringe Benefits & Payroll Taxes	-	-	236,750	357,927	467,722
Retirement	-	-	36,448	46,928	68,277
Management Company Fees	-	-	210,653	492,905	721,421
Building and Land Rent / Lease	-	-	1,409,404	1,719,192	1,755,808
Staff Development	-	-	73,846	48,565	66,223
Professional Fees, Consultant & Purchased Services	-	-	5,781	919	19,822
Marketing / Recruitment	-	-	127,895	60,738	84,385
Student Supplies, Materials & Services	-	-	378,463	296,123	183,800
Depreciation	-	-	44,656	58,395	77,029
Other	-	-	654,596	635,480	636,768
Total Expenses	-	-	4,447,547	5,627,971	6,660,611

SCHOOL ANALYSIS

ENROLLMENT

	2015-16	2016-17	2017-18	2018-19	2019-20
Original Chartered Enrollment	190	250	380	510	675
Final Chartered Enrollment (includes any revisions)	-	-	190	250	380
Actual Enrollment - GRAPH 4	-	-	93	203	298
Chartered Grades	K-1	K-2	K-3	K-4	K-5
Final Chartered Grades (includes any revisions)	Planning Year	Planning Year	K-1	K-2	K-3

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)	2015-16	2016-17	2017-18	2018-19	2019-20
Increase over prior year	0.0%	0.0%	100.0%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue

	2015-16	2016-17	2017-18	2018-19	2019-20
Operating	-	-	30,005	22,866	24,522
Other Revenue and Support	-	-	117	18	-
TOTAL - GRAPH 3	-	-	30,122	22,884	24,522

Expenses

	2015-16	2016-17	2017-18	2018-19	2019-20
Program Services	-	-	44,257	25,450	20,373
Management and General, Fundraising	-	-	3,566	2,274	1,993
TOTAL - GRAPH 3	-	-	47,823	27,724	22,366
% of Program Services	0.0%	0.0%	92.5%	91.8%	91.1%
% of Management and Other	0.0%	0.0%	7.5%	8.2%	8.9%
% of Revenue Exceeding Expenses - GRAPH 5	0.0%	0.0%	-37.0%	-17.5%	9.6%

Student to Faculty Ratio

	2015-16	2016-17	2017-18	2018-19	2019-20
Ratio	0.0	-	9.3	9.3	8.3

Faculty to Admin Ratio

	2015-16	2016-17	2017-18	2018-19	2019-20
Ratio	-	-	2.5	2.9	3.1

Financial Responsibility Composite Scores - GRAPH 6

Score	2015-16	2016-17	2017-18	2018-19	2019-20
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	0.0	0.0	0.0	0.0	0.0
	N/A	N/A	N/A	N/A	N/A

Working Capital - GRAPH 7

	2015-16	2016-17	2017-18	2018-19	2019-20
Net Working Capital	0	0	0	0	0
As % of Unrestricted Revenue	0.0%	0.0%	0.0%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	N/A	N/A	N/A

Quick (Acid Test) Ratio

	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	N/A	N/A	N/A

Debt to Asset Ratio - GRAPH 7

	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	N/A	N/A	N/A

Months of Cash - GRAPH 8

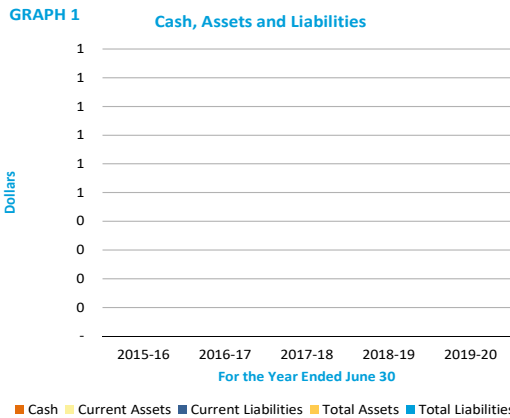
	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.0	0.0	0.0	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	N/A	N/A	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	N/A	N/A	N/A	N/A

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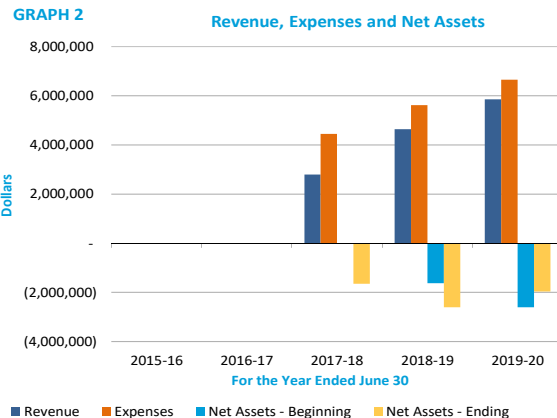
FISCAL DASHBOARD

SUCCESS ACADEMY CHARTER SCHOOL - HUDSON YARDS

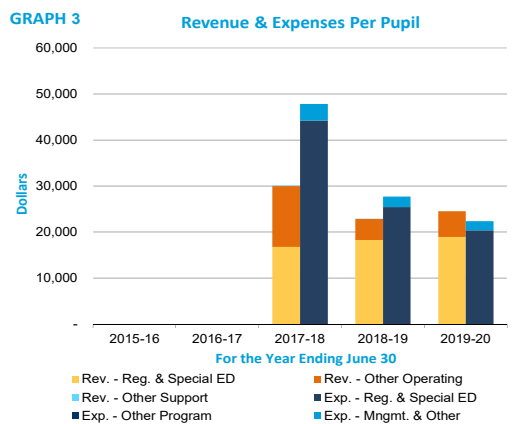
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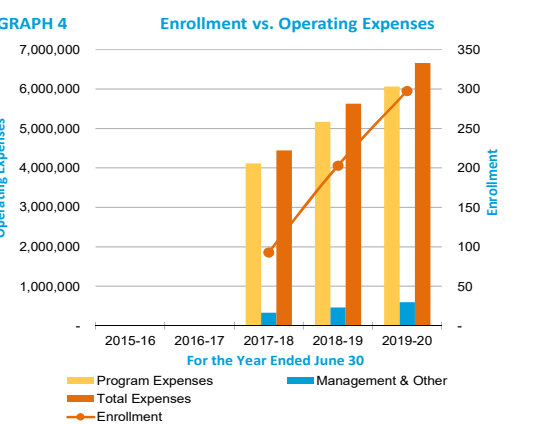
This chart illustrates the relationship between assets and liabilities and to what extent cash reserves makes up current assets. Ideally for each subset, subsets 2 through 4, (i.e. current assets vs. current liabilities), the column on the left is taller than the immediate column on the right; and, generally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



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



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



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

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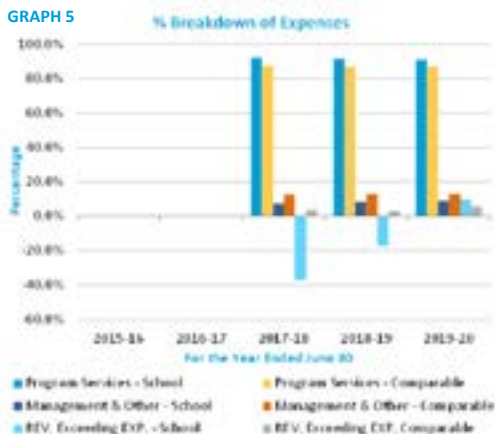
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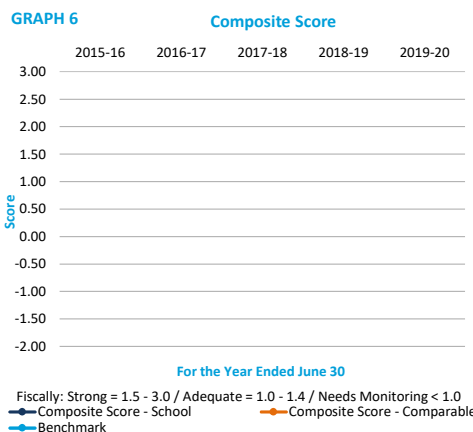
Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)

GRAPH 5



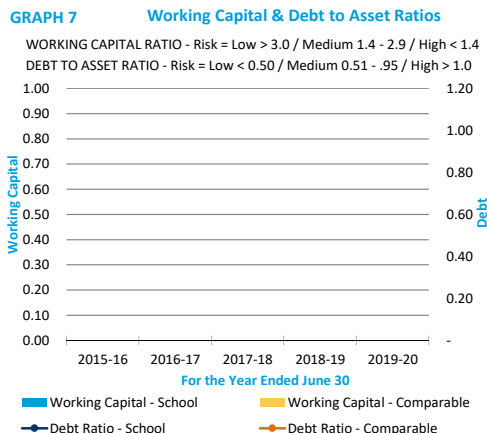
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding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

GRAPH 6



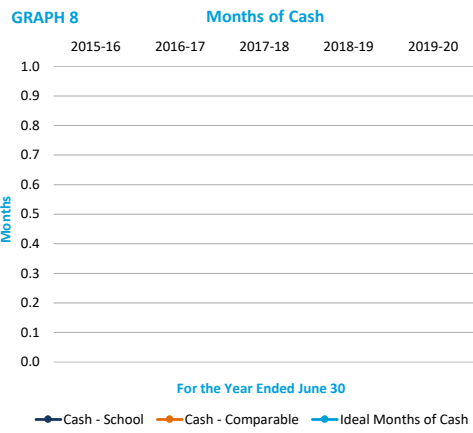
This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USDOE) to determine whether private not-for-profit colleges and universities are financially strong enough to participate in federal loan programs. These scores can be valid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

GRAPH 7



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

GRAPH 8



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

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FUTURE PLANS



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APPENDICES

PAGES Ax 1-25

EO^A
ED CORP
OVERVIEW

PAGE Ax 1

EF^B
ED CORP FISCAL

PAGE Ax 22

APPENDIX A: Education Corporation Overview

SUCCESS ACADEMY CHARTER SCHOOLS – NYC BOARD OF TRUSTEES

CHAIR

Samuel Cole

VICE CHAIR

Bryan Binder

TREASURER

Scott Friedman

SECRETARY

Suleman Lunat

TRUSTEES

Aaron Kinnari

Andrew Stone

Brian Levine

Bryan Binder

Derrell Bradford

Gregory Sawers

Jarrett Posner

Lorenzo Smith

Robin Pzena

Edwin Cespedes, non-voting
parent representative

Catherine Shinker, non-voting
trustee emeritus

SUCCESS ACADEMY CHARTER SCHOOLS, INC., BOARD OF TRUSTEES

CHAIR

Steven Galbraith

LEAD DIRECTOR

Mary Berner

VICE CHAIR

Suzie Kovner

TREASURER

Richard Pzena

SECRETARY

Kent Yalowitz

TRUSTEES

Richard Barrera

Dlahann Billings-Burford

Ravenel Curry

Joel Greenblatt

Kevin Hall

Kevin Liles

Yen Liow

Daniel Loeb

Robert Niehaus

John Petry

Luis Ubiñas

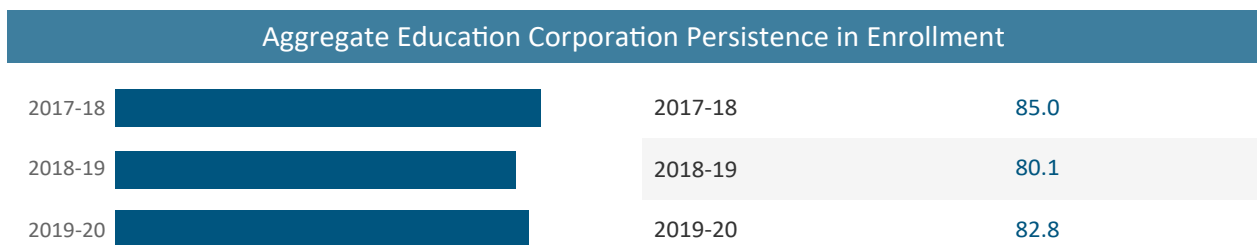
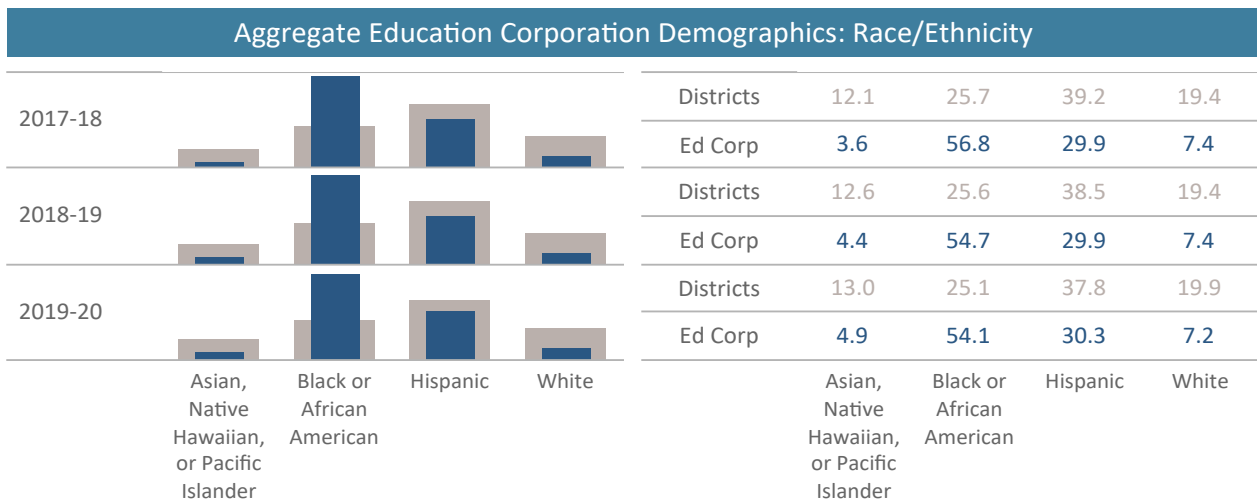
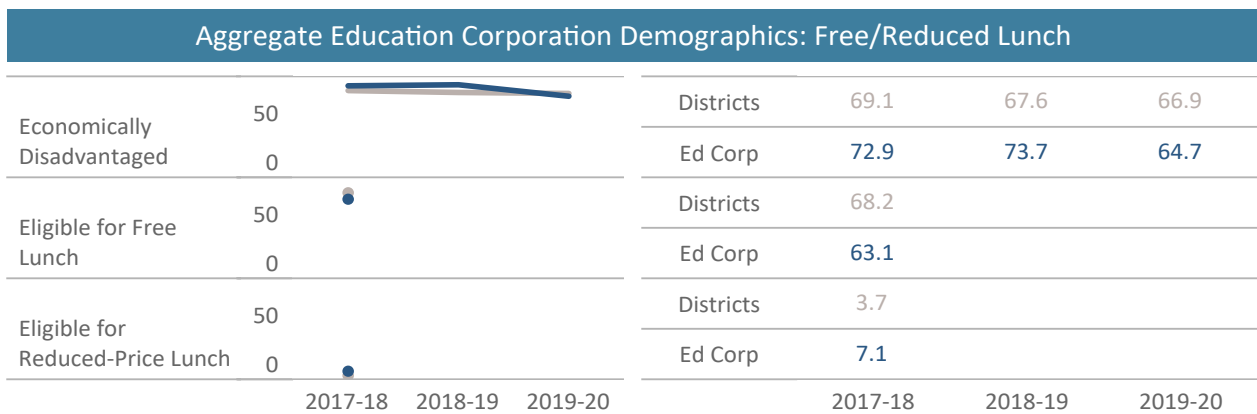
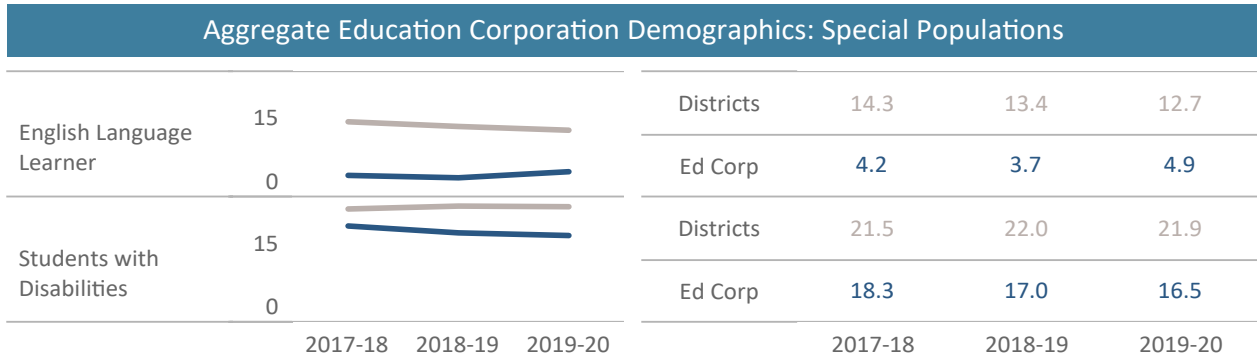
NETWORK LEADERS

CHIEF EXECUTIVE OFFICER

Eva Moskowitz (2006-07 to Present)

APPENDIX A: Education Corporation Overview

Success Academy Charter Schools - NYC Aggregate Education Corporation Enrollment and Persistence

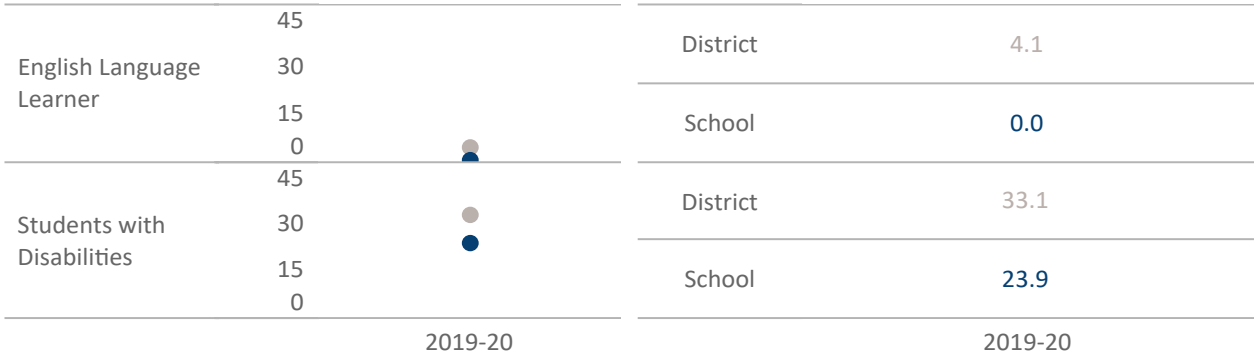


APPENDIX A: Education Corporation Overview

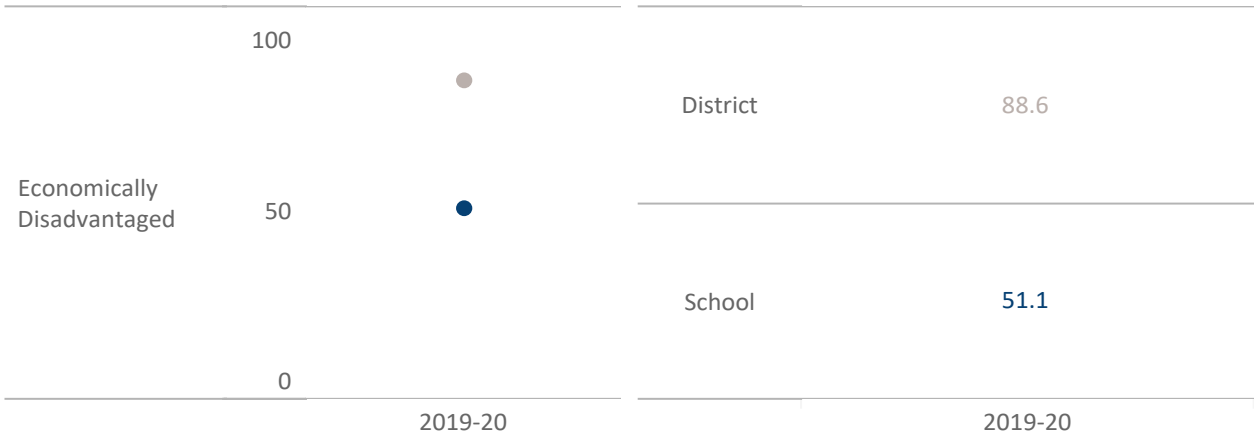
Success Academy Charter School - Bed Stuy 3

Brooklyn CSD 16

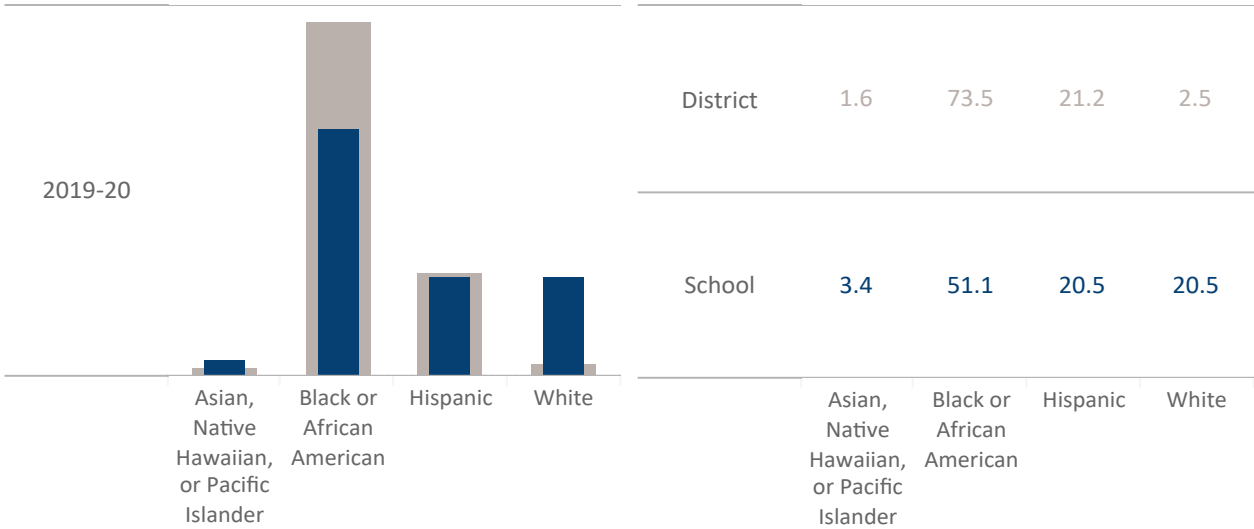
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

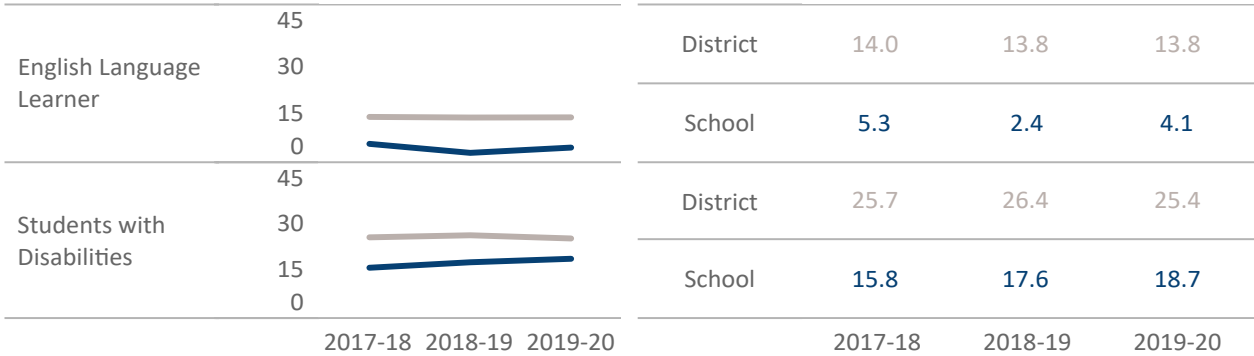


APPENDIX A: Education Corporation Overview

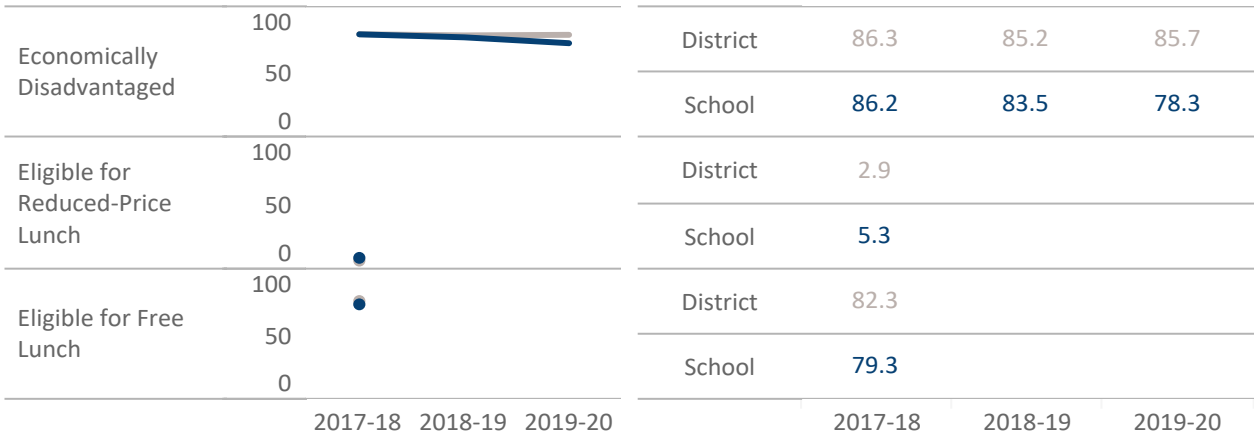
Success Academy Charter School - Bronx 3

Bronx CSD 8

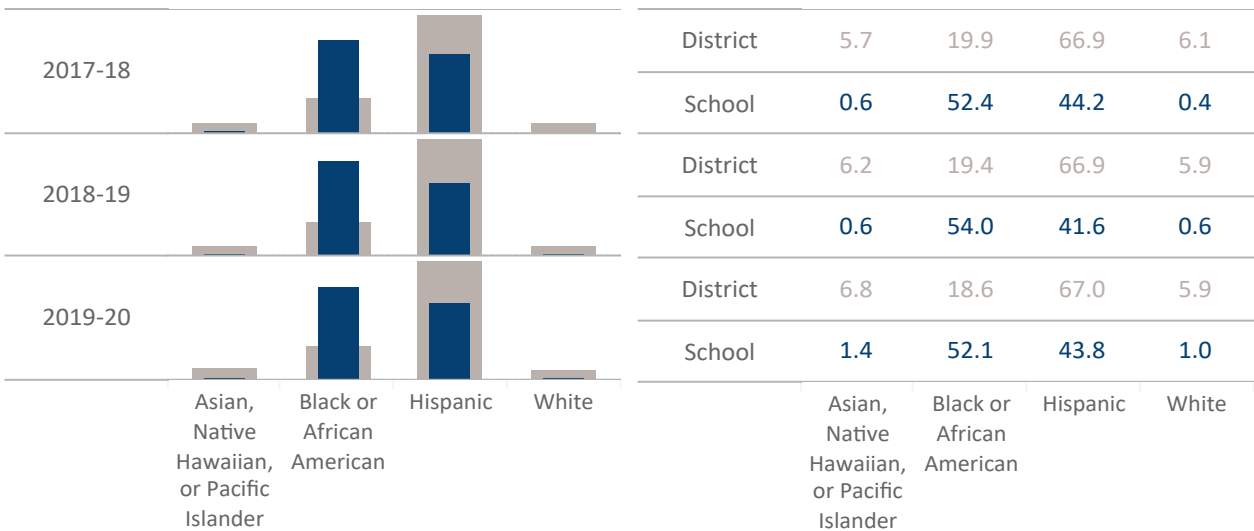
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Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

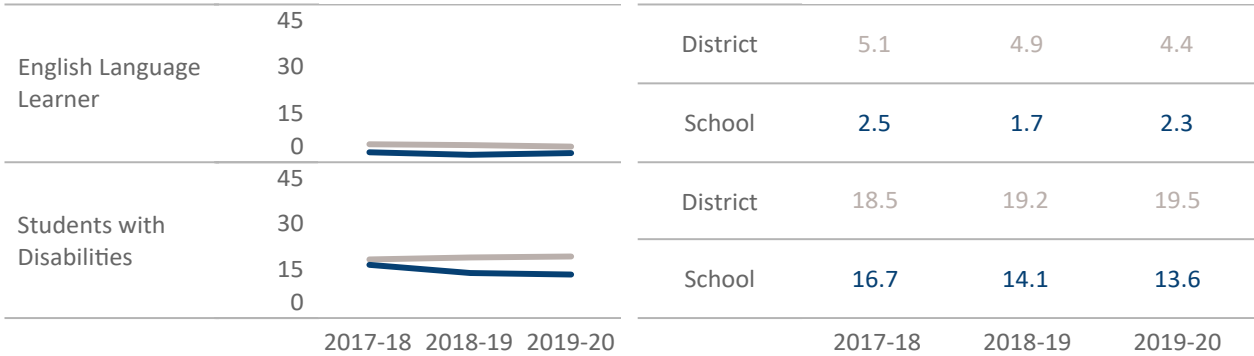


APPENDIX A: Education Corporation Overview

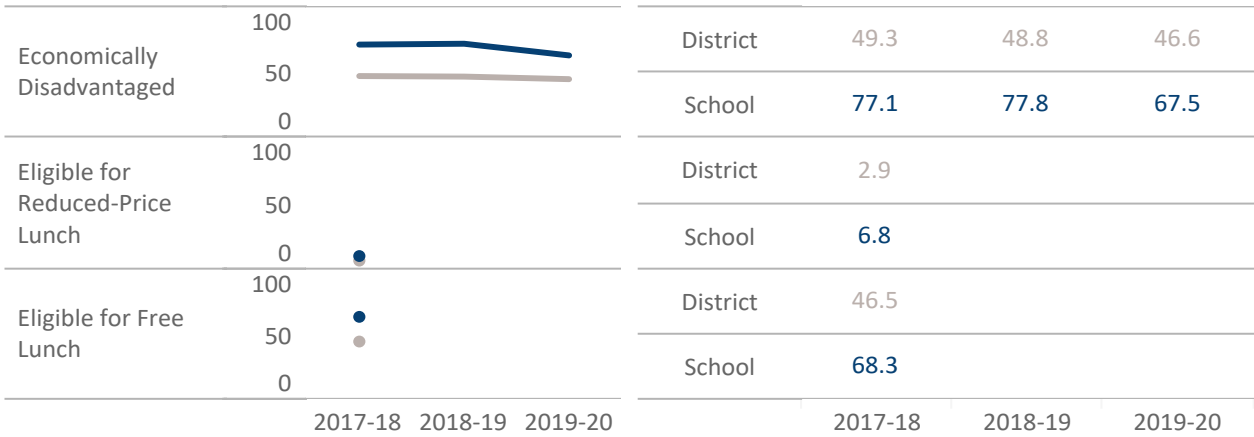
Success Academy Charter School - Harlem 1

Manhattan CSD 3

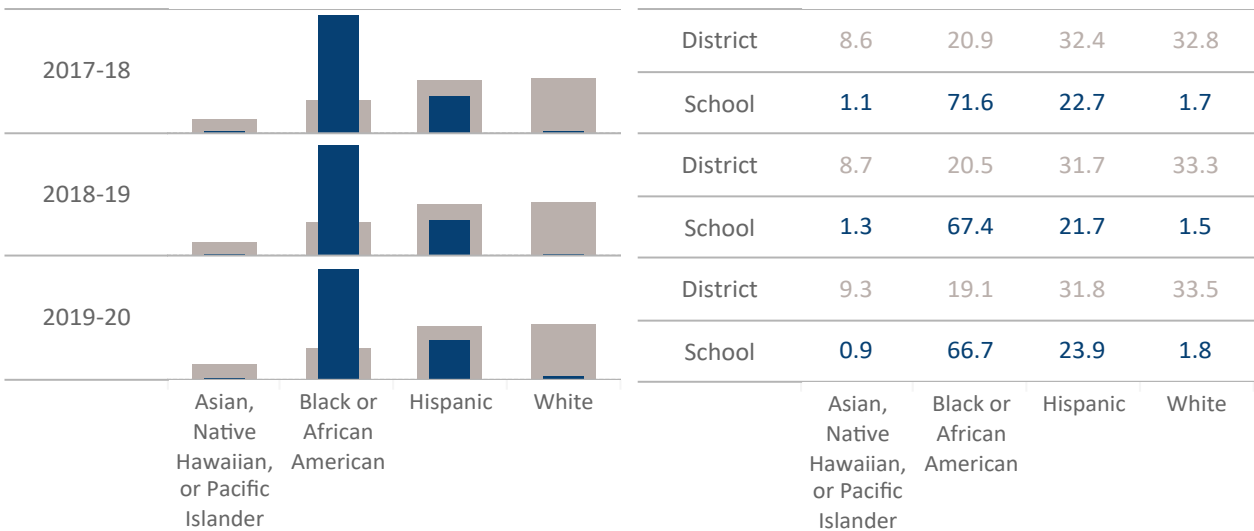
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

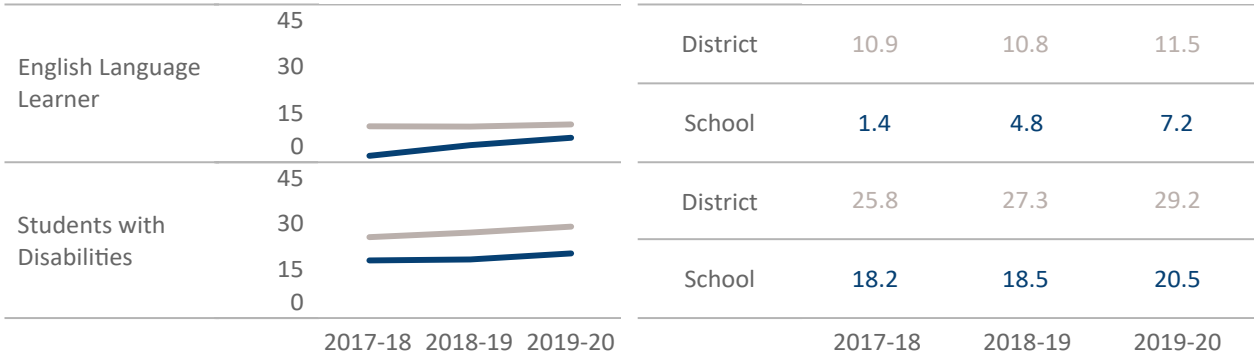


APPENDIX A: Education Corporation Overview

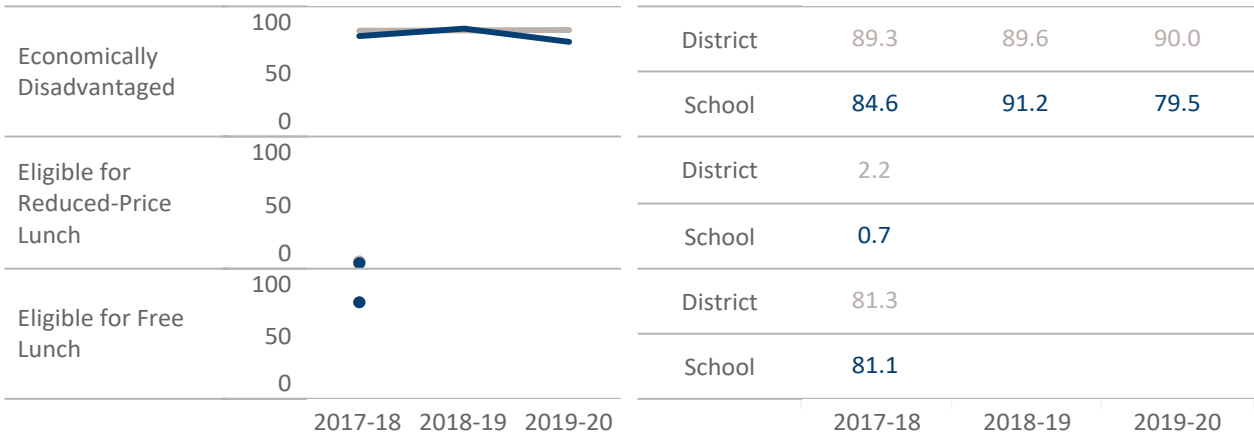
Success Academy Charter School - Harlem 6

Manhattan CSD 5

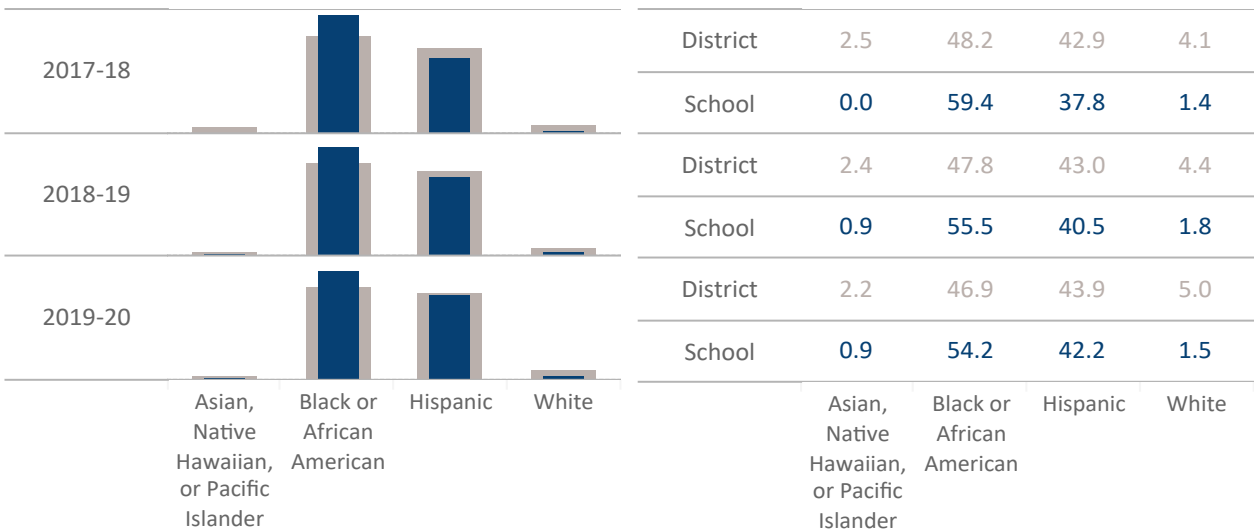
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

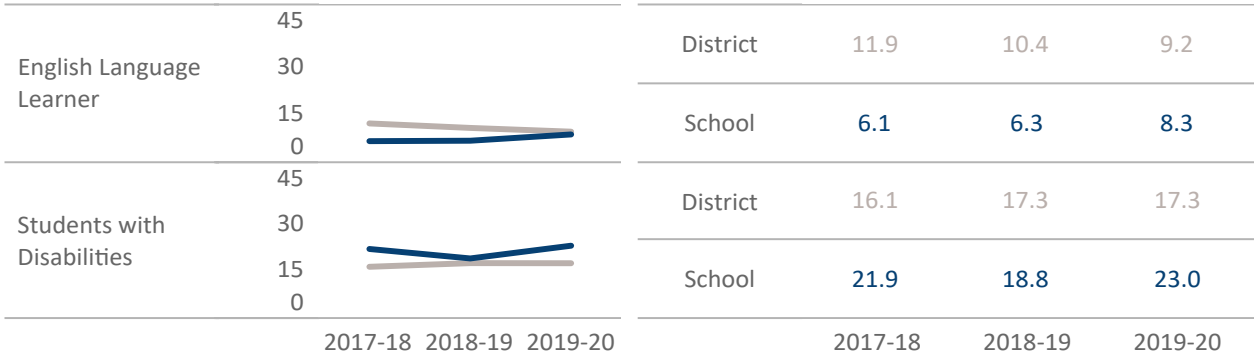


APPENDIX A: Education Corporation Overview

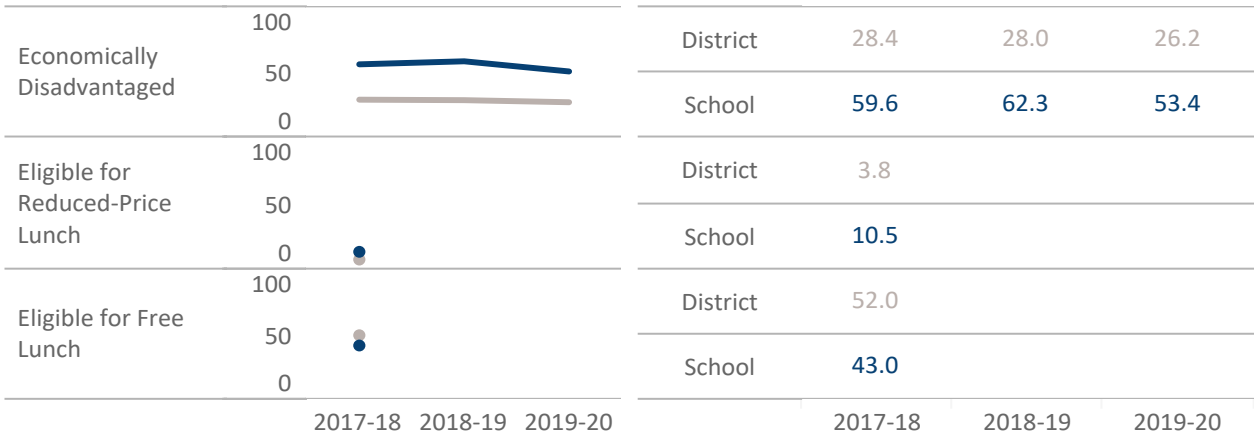
Success Academy Charter School - Hudson Yards

Manhattan CSD 2

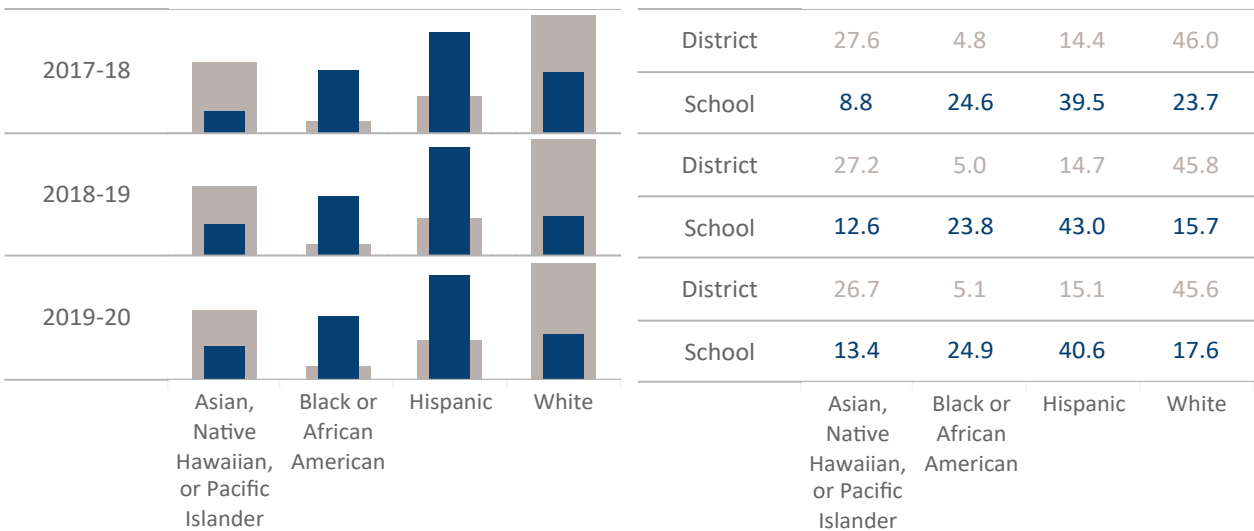
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch

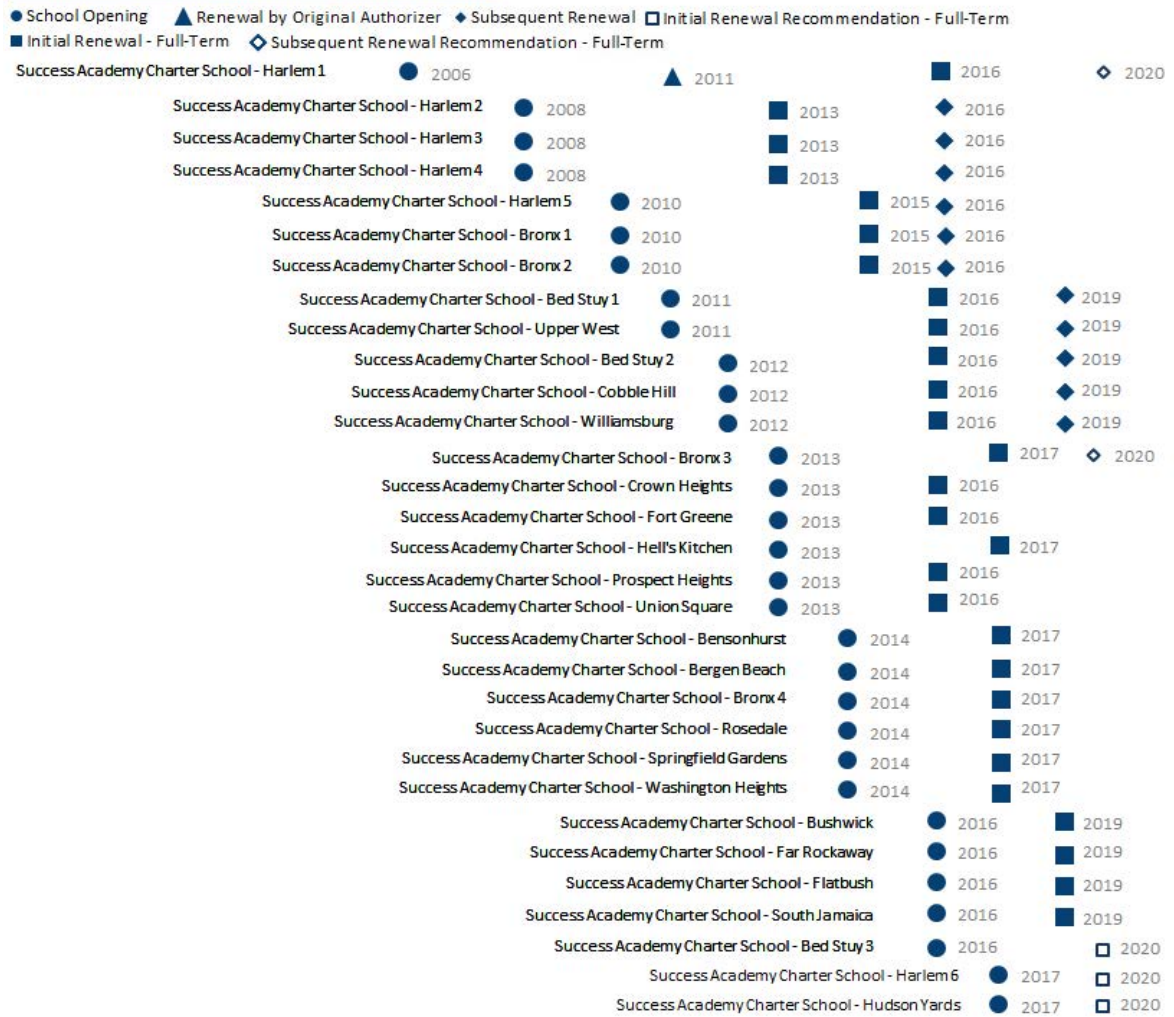


Student Demographics: Race/Ethnicity



APPENDIX A: Education Corporation Overview

EDUCATION CORPORATION TIMELINE OF CHARTER RENEWAL



APPENDIX A: Education Corporation Overview

SCHOOL VISIT HISTORY

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



SCHOOL VISIT HISTORY, CONTINUED

SCHOOL YEAR	SCHOOL AND VISIT TYPE	VISIT DATE
2016-17	Success BedStuy 2 - Renewal Visit	September 13, 2016
	Success Bensonhurst - Renewal Visit	April 13, 2017
	Success Bergen Beach - Renewal Visit	April 13, 2017
	Success Bronx 1 - Renewal Visit	September 15, 2016
	Success Bronx 2 - Renewal Visit	September 16, 2016
	Success Bronx 4 - Renewal Visit	April 11, 2017
	Success Clinton Hill - Renewal Visit	September 14, 2016
	Success Crown Heights - Renewal Visit	September 15, 2016
	Success Fort Greene - Renewal Visit	September 14, 2016
	Success Harlem 5 - Renewal Visit	September 16, 2016
	Success Hell's Kitchen - Renewal Visit	April 12, 2017
	Success Prospect Heights - Renewal Visit	September 15, 2016
	Success Rosedale - Renewal Visit	April 14, 2017
	Success Springfield Gardens - Renewal Visit	April 14, 2017
	Success Union Square - Renewal Visit	September 19, 2016
Success Washington Heights - Renewal Visit	April 10, 2017	
Success Williamsburg - Renewal Visit	September 13, 2016	
2017-18	Success Hudson Yards - First Year Visit	May 29, 2018
	Success Harlem 6 - First Year Visit	May 29, 2019
2018-19	Success BedStuy 1 - Renewal Visit	December 11, 2018
	Success Upper West - Renewal Visit	December 11, 2018
2019-20	Success BedStuy 2 - Renewal Visit	October 23, 2019
	Success Bushwick - Renewal Visit	October 23, 2019
	Success Cobble Hill - Renewal Visit	October 24, 2019
	Success Far Rockaway - Renewal Visit	October 25, 2019
	Success Flatbush - Renewal Visit	October 24, 2019
	Success South Jamaica - Renewal Visit	October 25, 2019
2020-21	Success Williamburg - Renewal Visit	October 24, 2019
	Success BedStuy 3 - Renewal Visit (remote) Success Harlem 1 - Renewal Visit (remote)	September 29-October 2, 2020

CONDUCT OF THE VISIT

DATE(S) OF VISIT	EVALUATION TEAM MEMBERS	TITLE
October 23-25, 2019	Andrew Kile	Director of School Evaluation
	Sinnjinn Bucknell	Director of Systems and Performance
	Vickie Masseus	School Evaluation Analyst

APPENDIX A: Education Corporation Overview

EDUCATION CORPORATION SCHOOL CHARACTERISTICS

SCHOOL	LOCAL DISTRICT	CO-LOCATED	GRADE SPAN	CHARTERED ENROLLMENT
Success Academy Charter School - Bed Stuy 1	CSD 14	Yes	K-8	1,131
Success Academy Charter School - Bed Stuy 2	CSD 14	Yes	K-4, 9	416
Success Academy Charter School - Bed Stuy 3	CSD 18	Yes	5-7	295
Success Academy Charter School - Bensonhurst	CSD 21	Yes	K-4	595
Success Academy Charter School - Bergen Beach	CSD 22	Yes	K-7	1,016
Success Academy Charter School - Bronx 1	CSD 7	Yes	K-4	596
Success Academy Charter School - Bronx 2	CSD 9	Yes	K-8	999
Success Academy Charter School - Bronx 3	CSD 8	Yes	K-8	1,273
Success Academy Charter School - Bronx 4	CSD 8	Yes	K-4	625
Success Academy Charter School - Bushwick	CSD 32	No – NYCDOE Leased	K-5	602
Success Academy Charter School - Cobble Hill	CSD15	Yes	K-4, 9	416
Success Academy Charter School - Crown Heights	CSD 17	Yes	K-8	753
Success Academy Charter School - Far Rockaway	CSD 27	Yes	K-5	675
Success Academy Charter School - Flatbush	CSD 17	No – NYCDOE Leased	K-5	602
Success Academy Charter School - Fort Greene	CSD 13	Yes	K-4	266
Success Academy Charter School - Harlem 1	CSD 3 CSD 2	Yes Yes	K-12	1,751
Success Academy Charter School - Harlem 2	CSD 5	Yes	K-8	908
Success Academy Charter School - Harlem 3	CSD 4	Yes	K-12	1,778
Success Academy Charter School - Harlem 4	CSD 3	Yes	K-4	417
Success Academy Charter School - Harlem 5	CSD 5	Yes	K-8	955
Success Academy Charter School - Harlem 6	CSD 3	Yes	K-4	510
Success Academy Charter School - Hell's Kitchen	CSD 2	Yes	K-4	415

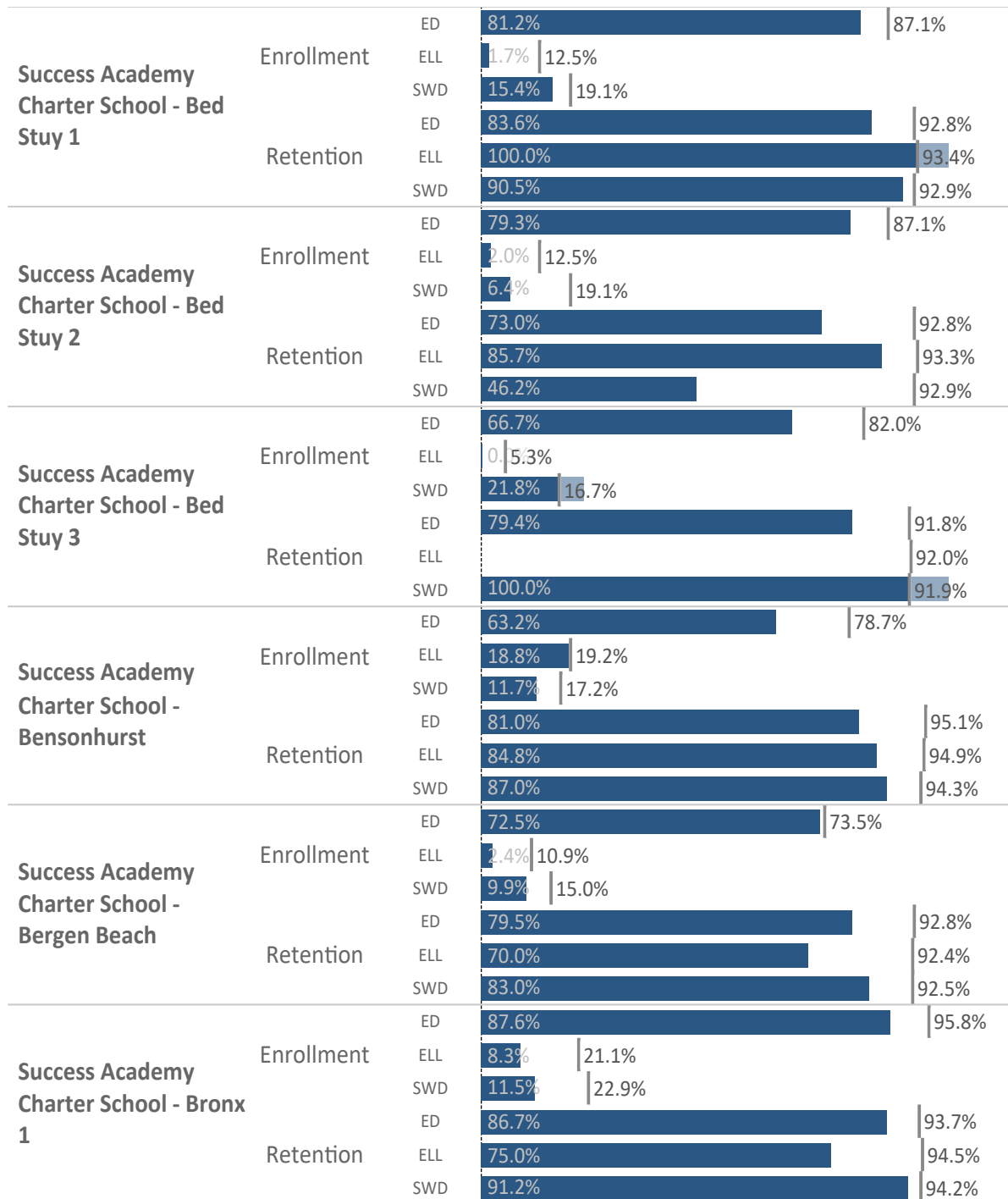
APPENDIX A: Education Corporation Overview

EDUCATION CORPORATION SCHOOL CHARACTERISTICS

SCHOOL	LOCAL DISTRICT	CO-LOCATED	GRADE SPAN	CHARTERED ENROLLMENT
Success Academy Charter School - Hudson Yards	CSD 2	Private Space	K-4	415
Success Academy Charter School - NYC 3	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 5	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 6	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 7	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 11	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 12	Not open	Not open	Not open	Not open
Success Academy Charter School - NYC 14	Not open	Not open	Not open	Not open
Success Academy Charter School - Prospect Heights	CSD 17 CSD 14	Yes Yes	K-4 5-8	970
Success Academy Charter School - Rosedale	CSD 29	No – NYCDOE Leased	K-4	664
Success Academy Charter School - South Jamaica	CSD 27	No – NYCDOE Leased	K-5	452
Success Academy Charter School - Springfield Gardens	CSD 29	Yes	K-7	896
Success Academy Charter School - Union Square	CSD 2	Yes	K-8	1,184
Success Academy Charter School - Upper West	CSD 3 CSD2	Yes Yes	K-4 5-8	853
Success Academy Charter School - Washington Heights	CSD 6	No – NYCDOE Leased	K-4	645
Success Academy Charter School - Williamsburg	CSD 14	Yes	K-4, 9	446

APPENDIX A: Education Corporation Overview

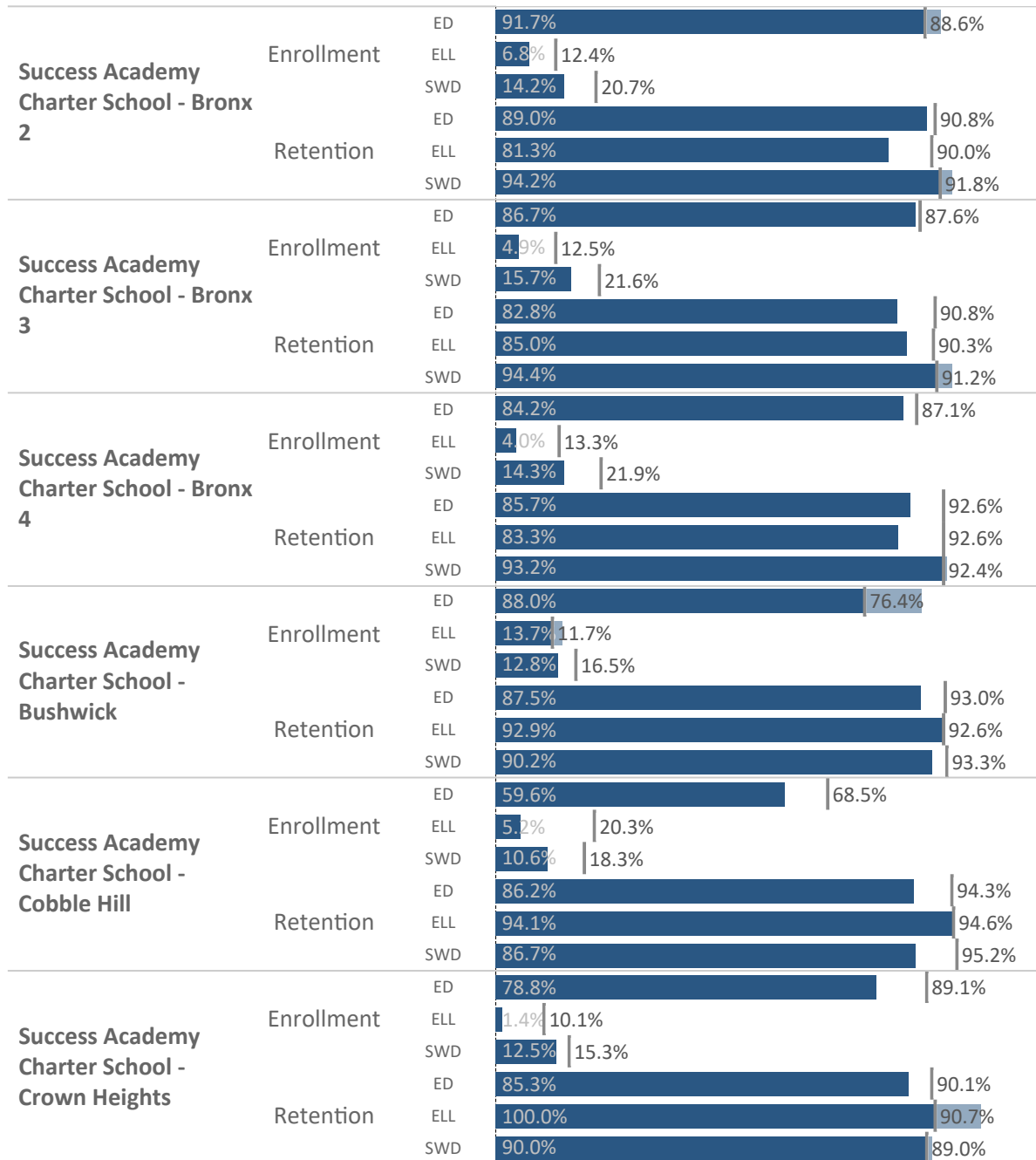
ENROLLMENT AND RETENTION TARGETS



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 2018-19 enrollment and retention data supplied to the Institute by the network.

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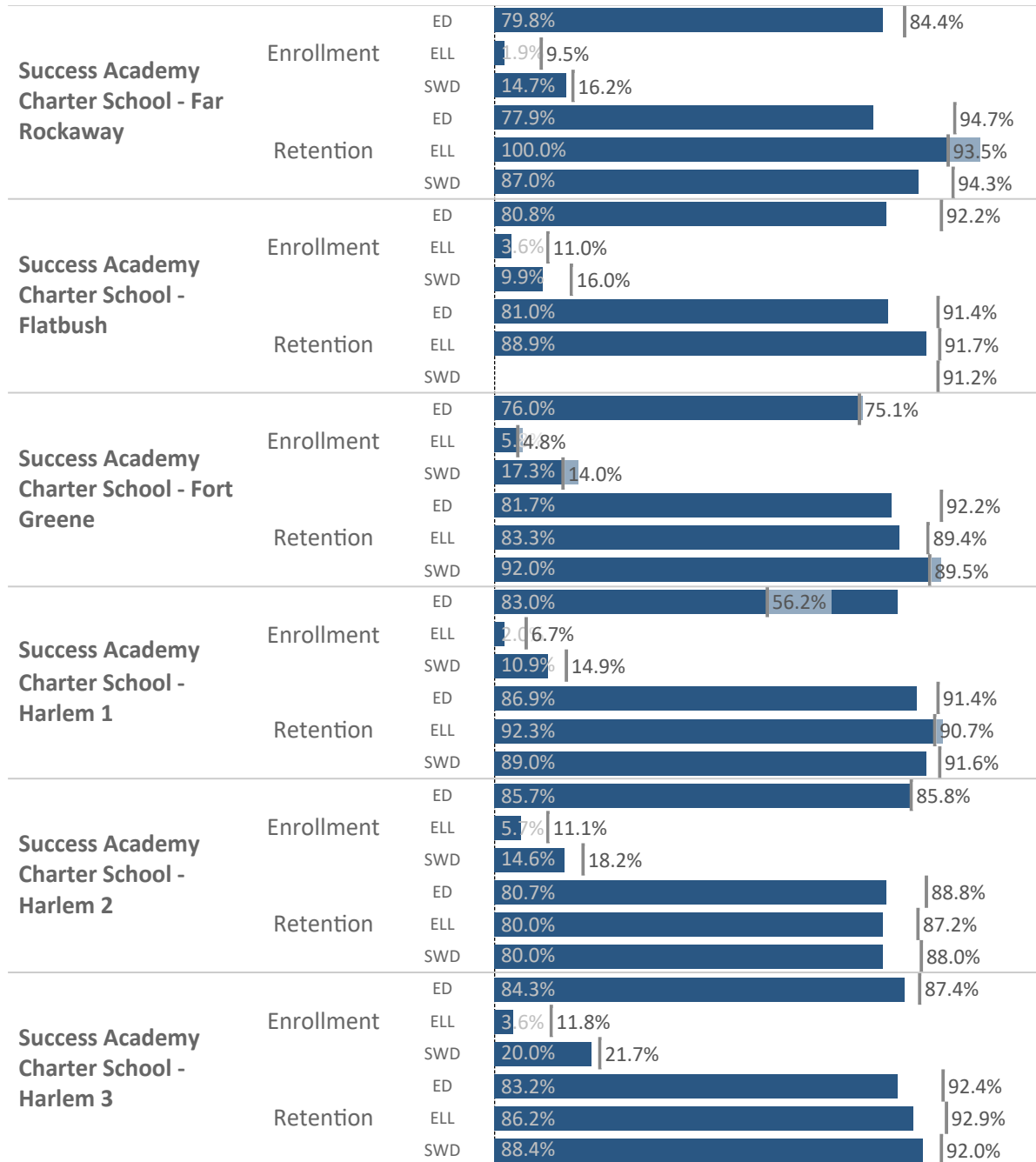
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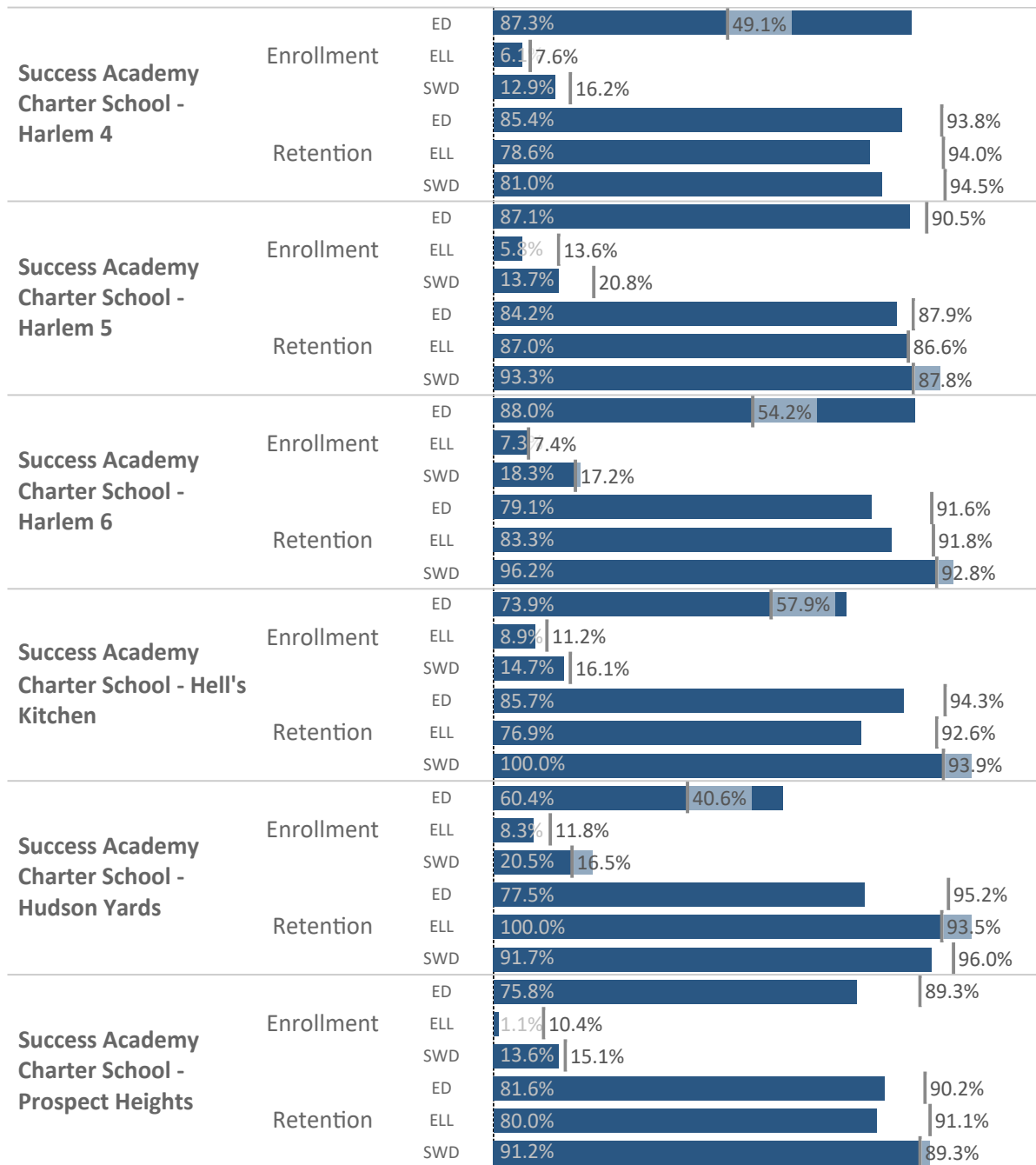
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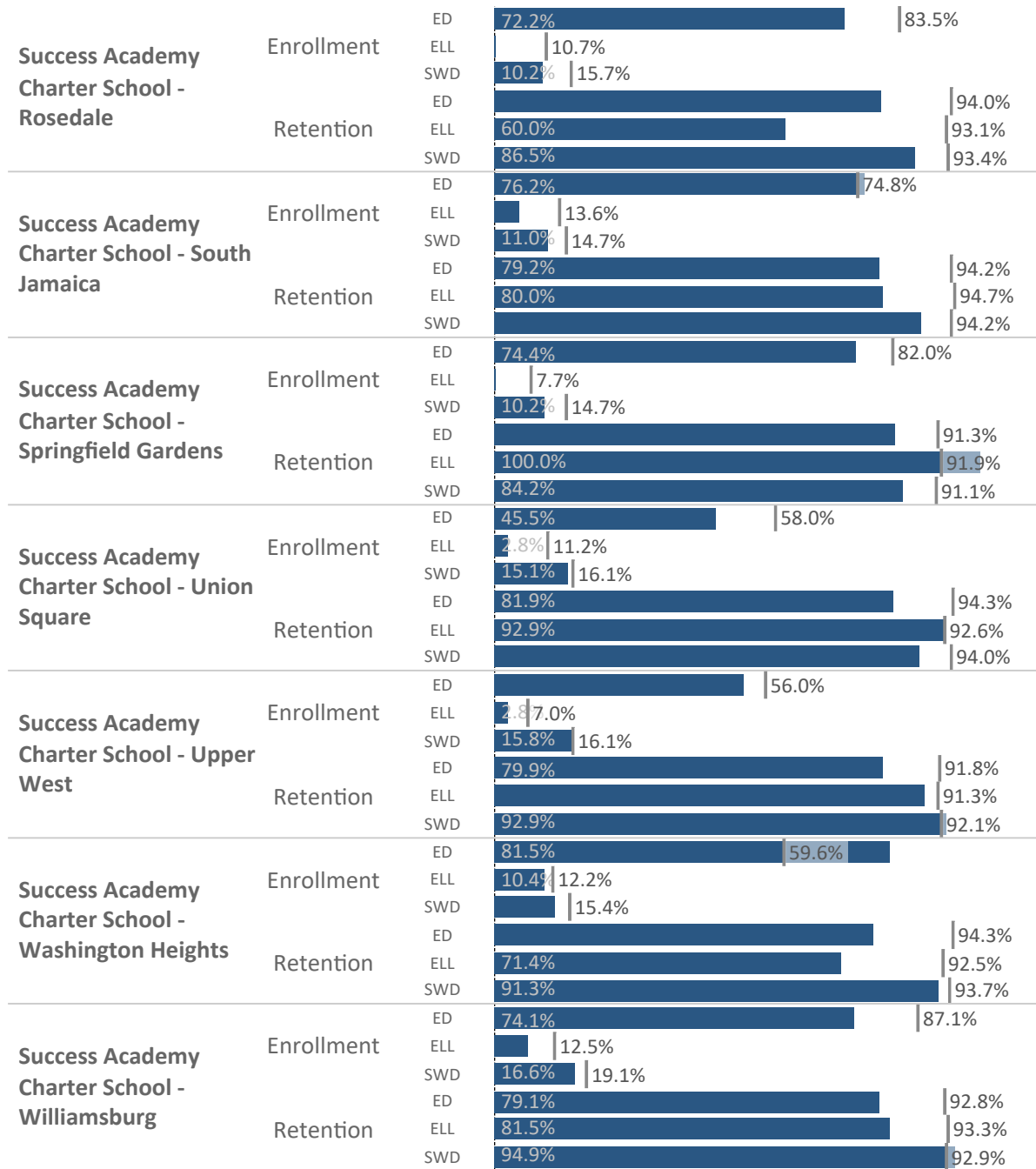
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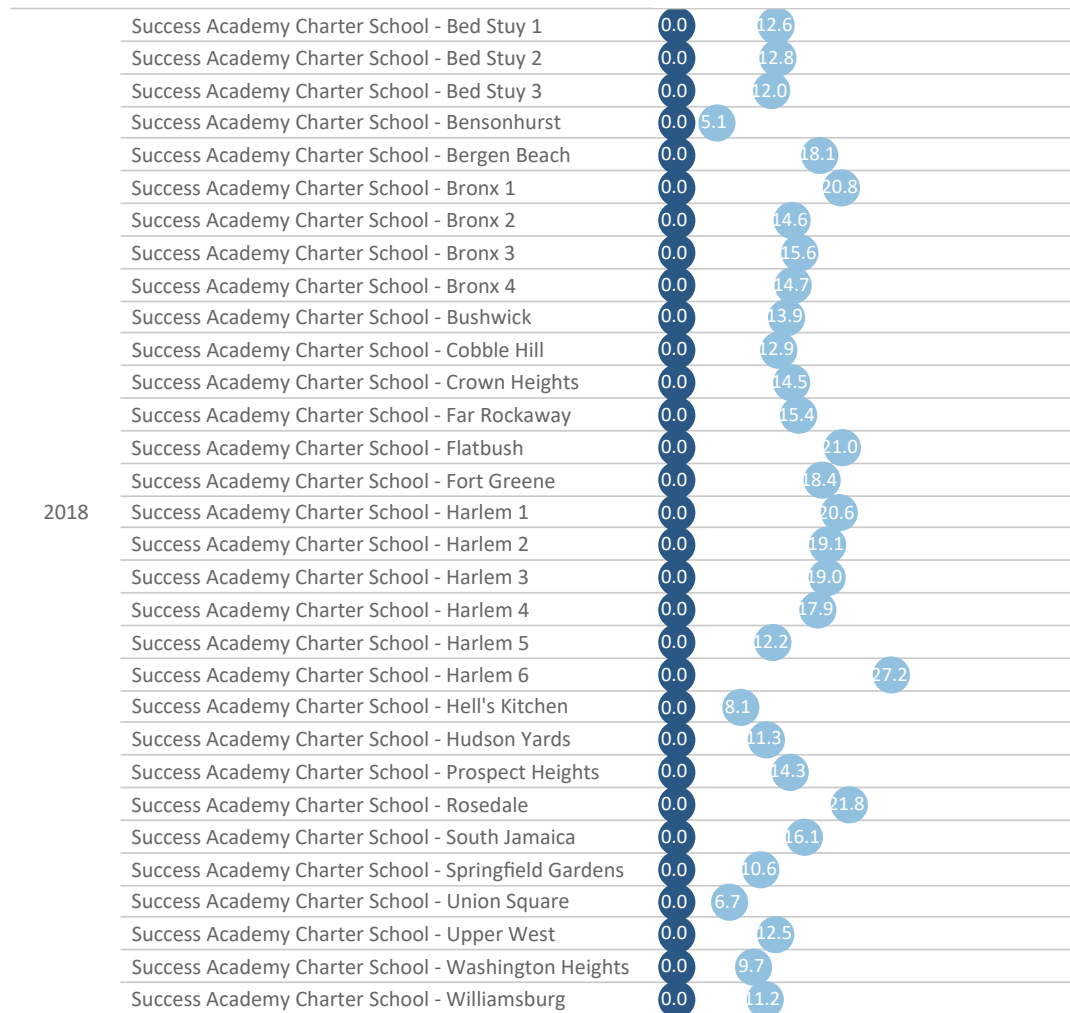
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APPENDIX A: Education Corporation Overview

Suspensions: Success Academy Charter Schools - NYC's out of school suspension rate and in school suspension rate.



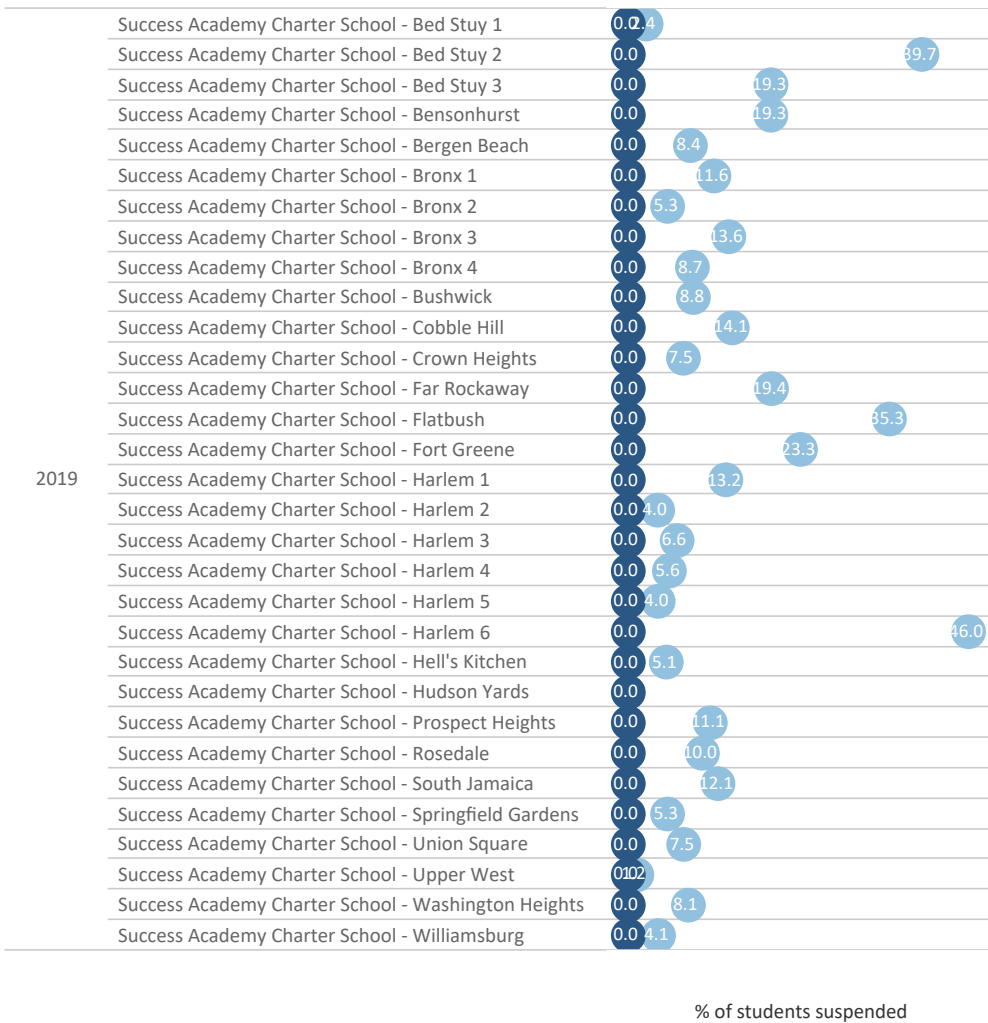
% of students suspended

New York City Community School District 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 2017-18 school year, Success Academy Charter Schools-NYC expelled 0 students.

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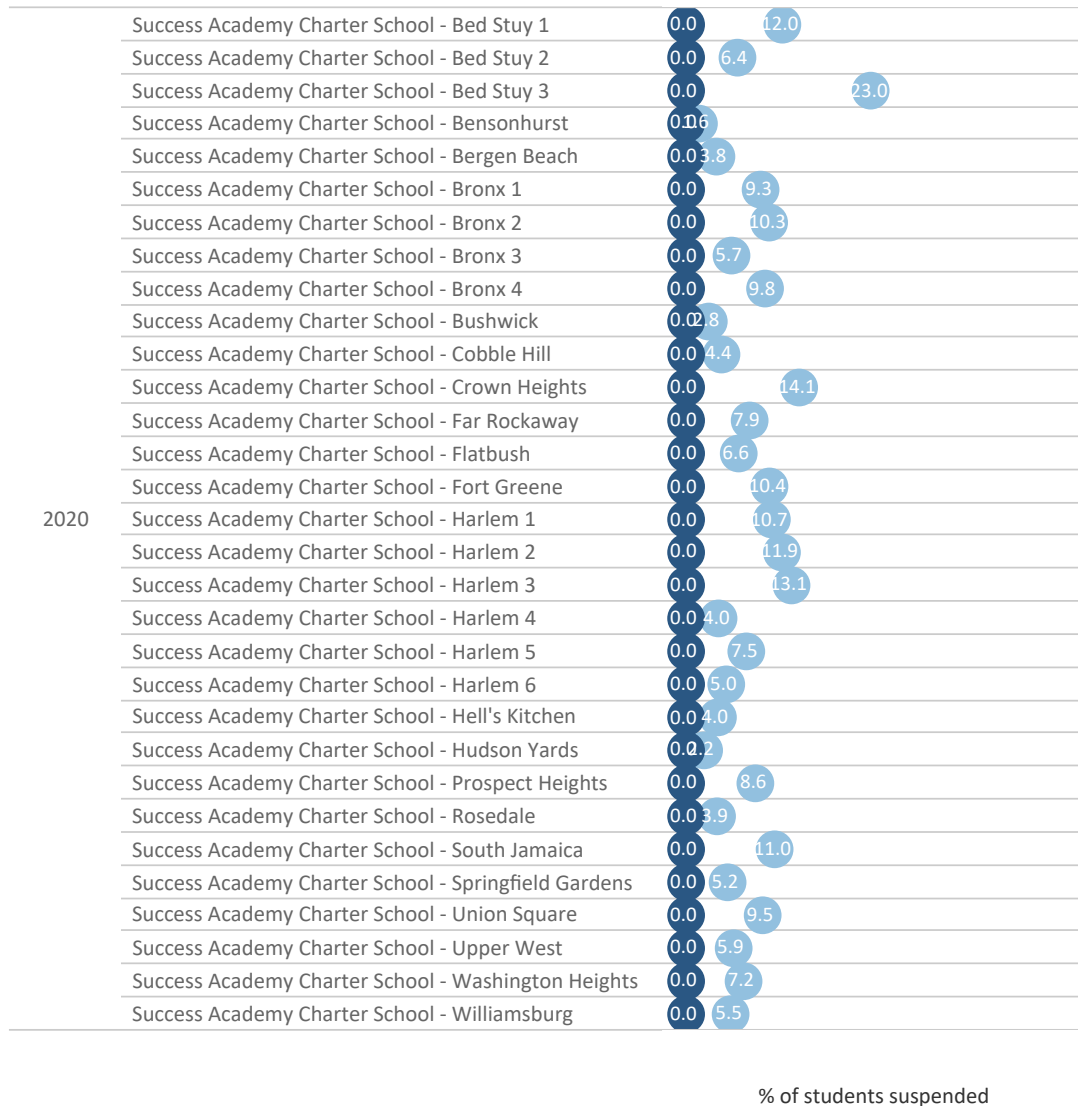


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During the 2019-20 school year, Success Academy Charter Schools-NYC expelled 0 students.

APPENDIX A: Education Corporation Overview

KEY DESIGN ELEMENTS:

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

APPENDIX B: Ed Corp Fiscal Dashboard

SUCCESS ACADEMY CHARTER SCHOOLS - NYC (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/Lease Liability
All other L-T debt and notes payable, net current maturities

Total Liabilities - GRAPH 1

Net Assets

Without Donor Restrictions
With Donor Restrictions

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
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 Temporally 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 2015-16	MERGED 2016-17	MERGED 2017-18	MERGED 2018-19	MERGED 2019-20
Cash and Cash Equivalents - GRAPH 1	8,989,662	5,713,520	91,795	11,088,935	33,058,593
Grants and Contracts Receivable	14,823,909	14,017,217	19,520,440	8,522,223	10,730,964
Accounts Receivable	-	-	-	-	-
Prepaid Expenses	5,464,767	3,882,364	5,660,659	2,740,045	1,583,551
Contributions and Other Receivables	-	-	-	-	-
Total Current Assets - GRAPH 1	29,278,338	23,613,101	25,272,894	22,351,203	45,373,108
Property, Building and Equipment, net	27,796,762	41,916,057	47,203,294	52,562,869	41,880,440
Other Assets	351,816	342,000	-	-	350,000
Total Assets - GRAPH 1	57,426,916	65,871,158	72,476,188	74,914,072	87,603,548

Accounts Payable and Accrued Expenses	2,078,759	3,709,198	7,234,456	14,038,164	7,430,623
Accrued Payroll and Benefits	55,227	1,769,268	2,470,431	2,990,511	4,962,899
Deferred Revenue	-	-	-	-	-
Current Maturities of Long-Term Debt	-	-	3,617,779	-	-
Short Term Debt - Bonds, Notes Payable	-	1,950,000	-	5,887,957	3,615,452
Other	26,600,039	31,722,351	39,758,489	20,642,768	5,321,513
Total Current Liabilities - GRAPH 1	28,734,025	39,150,817	53,081,155	43,559,401	21,330,487
Deferred Rent/Lease Liability	-	-	2,173,683	3,251,498	3,114,496
All other L-T debt and notes payable, net current maturities	8,500,000	5,550,000	5,527,572	5,366,156	7,264,171
Total Liabilities - GRAPH 1	37,234,025	44,700,817	60,782,410	52,177,054	31,709,154

Without Donor Restrictions	20,192,891	21,170,341	11,693,778	22,384,818	55,894,394
With Donor Restrictions	-	-	-	352,200	-
Total Net Assets	20,192,891	21,170,341	11,693,778	22,737,018	55,894,394
Total Liabilities and Net Assets	57,426,916	65,871,158	72,476,188	74,914,072	87,603,548

Resident Student Enrollment	151,376,532	186,894,948	217,023,301	247,606,042	287,276,780
Students with Disabilities	14,039,725	23,689,396	29,525,533	30,637,131	30,978,227
Grants and Contracts					
State and local	4,640,041	967,780	481,202	720,000	-
Federal - Title and IDEA	4,607,287	5,629,226	11,941,032	11,882,183	10,401,522
Federal - Other	4,489,275	6,126,807	686,808	130,000	716,053
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	964,391	2,148,873	2,980,281
Food Service/Child Nutrition Program	-	2,478,353	2,550,955	3,541,922	-
Total Operating Revenue	179,152,860	225,786,510	263,173,222	296,666,152	332,352,863

Regular Education	149,519,360	184,131,782	182,962,870	186,033,590	191,074,432
SPED	20,389,004	25,108,876	67,671,199	75,985,551	78,044,485
Other	-	-	-	-	-
Total Program Services	169,908,364	209,240,659	250,634,069	262,019,141	269,118,917
Management and General	13,720,907	18,338,924	23,256,083	24,397,628	30,527,886
Fundraising	-	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4	183,629,270	227,579,583	273,890,152	286,416,769	299,646,803
Surplus / (Deficit) From School Operations	(4,476,410)	(1,793,073)	(10,716,930)	10,249,382	32,706,059

Contributions	870,064	2,066,006	467,922	-	-
Fundraising	-	-	-	-	-
Miscellaneous Income	783,569	704,522	772,422	793,664	451,519
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	1,653,633	2,770,528	1,240,344	793,664	451,519

Total Unrestricted Revenue	180,806,493	228,557,038	264,413,566	297,459,815	329,824,100
Total Temporally Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	180,806,493	228,557,038	264,413,566	297,459,815	329,824,100

Change in Net Assets	(2,822,777)	977,456	(9,476,586)	11,043,046	33,157,578
Net Assets - Beginning of Year - GRAPH 2	23,015,666	20,192,887	21,170,337	11,693,778	22,736,816
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	20,192,888	21,170,343	11,693,751	22,736,824	55,894,394

APPENDIX B: Ed Corp Fiscal Dashboard

SUCCESS ACADEMY CHARTER SCHOOLS - NYC (COMBINED)

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2015-16	2016-17	2017-18	2018-19	2019-20
Personnel Service	19,451,327	23,013,530	28,250,961	34,107,934	38,644,059
Administrative Staff Personnel					
Instructional Personnel	71,767,365	86,103,852	99,473,376	99,648,669	112,901,270
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	91,218,692	109,117,382	127,724,337	133,756,603	151,545,329
Fringe Benefits & Payroll Taxes	17,684,147	19,620,130	23,902,313	25,781,734	26,641,977
Retirement	2,163,405	2,569,914	2,985,767	2,994,130	3,727,652
Management Company Fees	21,983,037	27,172,471	31,695,869	36,035,414	42,678,091
Building and Land Rent / Lease	-	-	3,247,791	3,637,327	3,518,524
Staff Development	2,840,659	2,876,125	3,520,654	3,017,574	3,013,619
Professional Fees, Consultant & Purchased Services	1,425,410	1,224,353	609,012	168,300	4,584,365
Marketing / Recruitment	2,874,164	4,023,767	5,018,389	5,594,568	5,108,127
Student Supplies, Materials & Services	11,253,433	13,528,905	20,205,032	18,127,105	12,654,793
Depreciation	13,473,388	16,241,135	18,205,477	20,112,701	19,363,530
Other	18,712,937	31,205,409	36,775,511	37,191,313	26,810,796
Total Expenses	183,629,272	227,579,591	273,890,152	286,416,769	299,646,803

SCHOOL ANALYSIS

ENROLLMENT

	2015-16	2016-17	2017-18	2018-19	2019-20
Original Chartered Enrollment	12,925	17,103	19,930	23,103	25,872
Final Chartered Enrollment (includes any revisions)	11,714	15,111	17,869	18,219	21,310
Actual Enrollment - GRAPH 4	10,420	12,627	14,053	15,357	17,617
Chartered Grades	-	-	-	-	-
Final Chartered Grades (includes any revisions)	-	-	-	-	-

Primary School District:

Per Pupil Funding (Weighted Avg of All Districts)	2015-16	2016-17	2017-18	2018-19	2019-20
	13,877	13,877	14,527	15,307	16,150
Increase over prior year	2.5%	0.0%	4.5%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue

	2015-16	2016-17	2017-18	2018-19	2019-20
Operating	18,119	17,881	18,727	19,318	18,865
Other Revenue and Support	159	219	88	52	26
TOTAL - GRAPH 3	18,278	18,101	18,815	19,370	18,891

Expenses

	2015-16	2016-17	2017-18	2018-19	2019-20
Program Services	16,306	16,571	17,835	17,062	15,276
Management and General, Fundraising	1,317	1,452	1,655	1,589	1,733
TOTAL - GRAPH 3	17,623	18,023	19,490	18,651	17,009
% of Program Services	92.5%	91.9%	91.5%	91.5%	89.8%
% of Management and Other	7.5%	8.1%	8.5%	8.5%	10.2%
% of Revenue Exceeding Expenses - GRAPH 5	3.7%	0.4%	-3.5%	3.9%	11.1%

Student to Faculty Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
5.4	10.5	10.6	9.1	10.4

Faculty to Admin Ratio

2015-16	2016-17	2017-18	2018-19	2019-20
4.0	3.8	3.9	3.7	3.7

Financial Responsibility Composite Scores - GRAPH 6

Score	2015-16	2016-17	2017-18	2018-19	2019-20
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	1.0	0.8	0.1	1.1	2.2
	Fiscally Adequate	Fiscally Needs Monitoring	Fiscally Needs Monitoring	Fiscally Adequate	Fiscally Strong

Working Capital - GRAPH 7

	2015-16	2016-17	2017-18	2018-19	2019-20
Net Working Capital	544,313	(15,537,716)	(27,808,261)	(21,208,198)	24,042,621
As % of Unrestricted Revenue	0.3%	-6.8%	-10.5%	-7.1%	7.3%
Working Capital (Current) Ratio Score	1.0	0.6	0.5	0.5	2.1
Risk (Low ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)	HIGH	HIGH	HIGH	HIGH	MEDIUM
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	Poor	Poor	Poor	Poor	Good

Quick (Acid Test) Ratio

	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.8	0.5	0.4	0.5	2.1
Risk (Low ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)	HIGH	HIGH	HIGH	HIGH	MEDIUM
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	Poor	Poor	Poor	Poor	Good

Debt to Asset Ratio - GRAPH 7

	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.6	0.7	0.8	0.7	0.4
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	MEDIUM	MEDIUM	MEDIUM	MEDIUM	LOW
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	Good	Good	Good	Good	Excellent

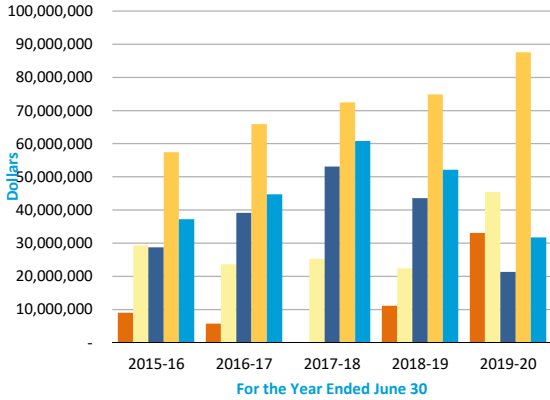
Months of Cash - GRAPH 8

	2015-16	2016-17	2017-18	2018-19	2019-20
Score	0.6	0.3	0.0	0.5	1.3
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	HIGH	HIGH	HIGH	HIGH	MEDIUM
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	Poor	Poor	Poor	Poor	Good

APPENDIX B: Ed Corp Fiscal Dashboard

SUCCESS ACADEMY CHARTER SCHOOLS - NYC (COMBINED)

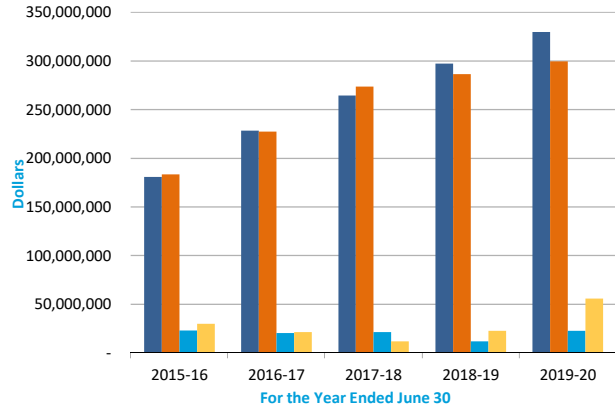
GRAPH 1 Cash, Assets and Liabilities



■ 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.

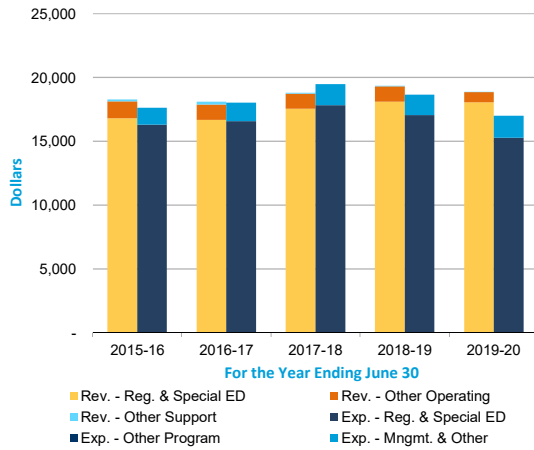
GRAPH 2 Revenue, Expenses and Net Assets



■ 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.

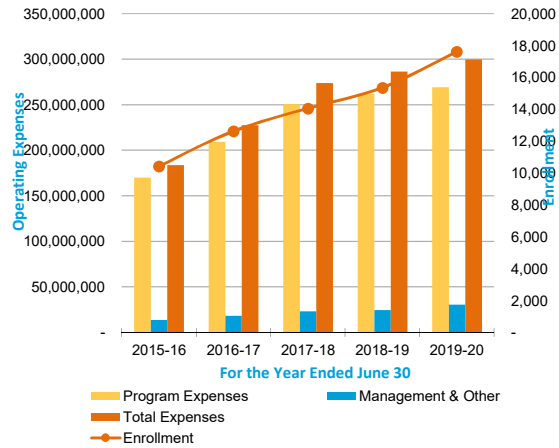
GRAPH 3 Revenue & Expenses Per Pupil



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

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



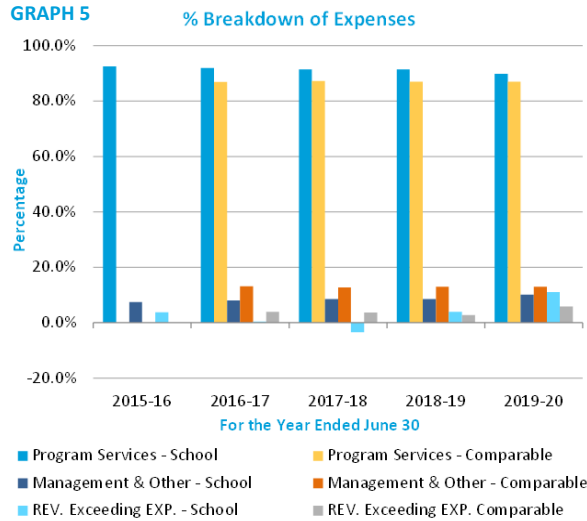
■ Program Expenses ■ Total Expenses ■ Management & Other — Enrollment

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.

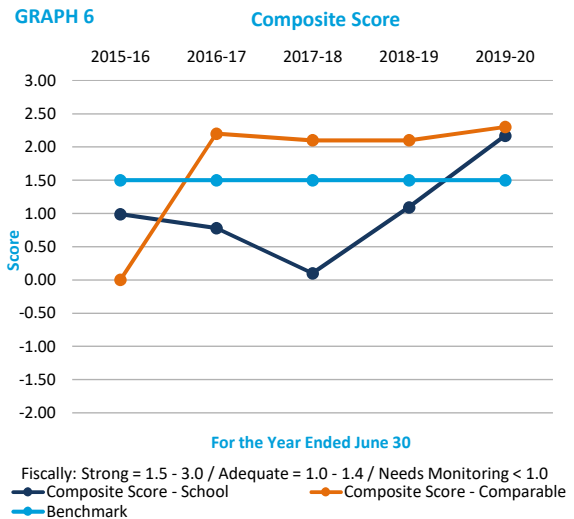
APPENDIX B: Ed Corp Fiscal Dashboard

SUCCESS ACADEMY CHARTER SCHOOLS - NYC (COMBINED)

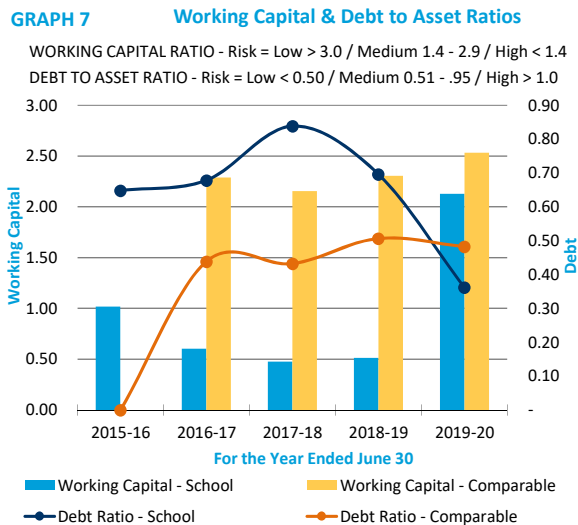
Comparable School, Region or Network: All SUNY Authorized Charter Schools (Including Closed Schools)



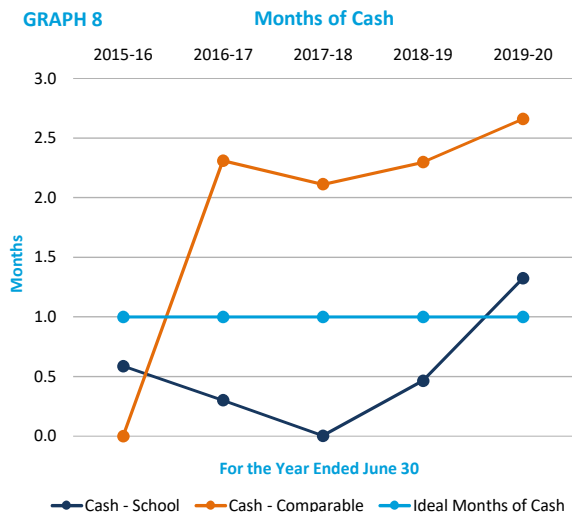
This chart illustrates the percentage expense breakdown between program services and management & others as well as the percentage of revenues exceeding expenses. Ideally the percentage expense for program services will far exceed that of the management & other expense. The percentage of revenues exceeding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



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



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



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

