



THE SUNY CHARTER SCHOOLS INSTITUTE

*RENEWAL RECOMMENDATION REPORT
BRONX CHARTER SCHOOL FOR
EXCELLENCE 2*

Report Date: March 9, 2021

Visit Date: November 30 – December 3, 2020

SUNY Charter Schools Institute
H. Carl McCall SUNY Building
353 Broadway
Albany, NY 12246

518.445.4250
www.newyorkcharters.org



Charter Schools Institute
The State University of New York

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H. Carl McCall SUNY Building
353 Broadway
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INTRODUCTION & REPORT FORMAT

This report is the primary means by which the SUNY Charter Schools Institute (the “Institute”) transmits to the State University of New York Board of Trustees (the “SUNY Trustees”) its findings and recommendations regarding a school’s Application for Charter Renewal, and more broadly, details the merits of a school’s case for renewal. The Institute has created and issued this report pursuant to the ***Policies for the Renewal of Not-For-Profit Charter School Education Corporations and Charter Schools Authorized by the Board of Trustees of the State University of New York*** (the “SUNY Renewal Policies”).¹

THE INSTITUTE MAKES ALL RENEWAL RECOMMENDATIONS BASED ON

A SCHOOL’S
APPLICATION
FOR CHARTER
RENEWAL

INFORMATION
GATHERED DURING
THE CHARTER TERM

ACADEMIC
PERFORMANCE

FISCAL SOUNDNESS

LEGAL COMPLIANCE

RENEWAL
EVALUATION VISIT



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

1. Revised September 4,
2013 and available at: [www.
newyorkcharters.org/SUNY-
Renewal-Policies/](http://www.newyorkcharters.org/SUNY-Renewal-Policies/).

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REPORT FORMAT

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



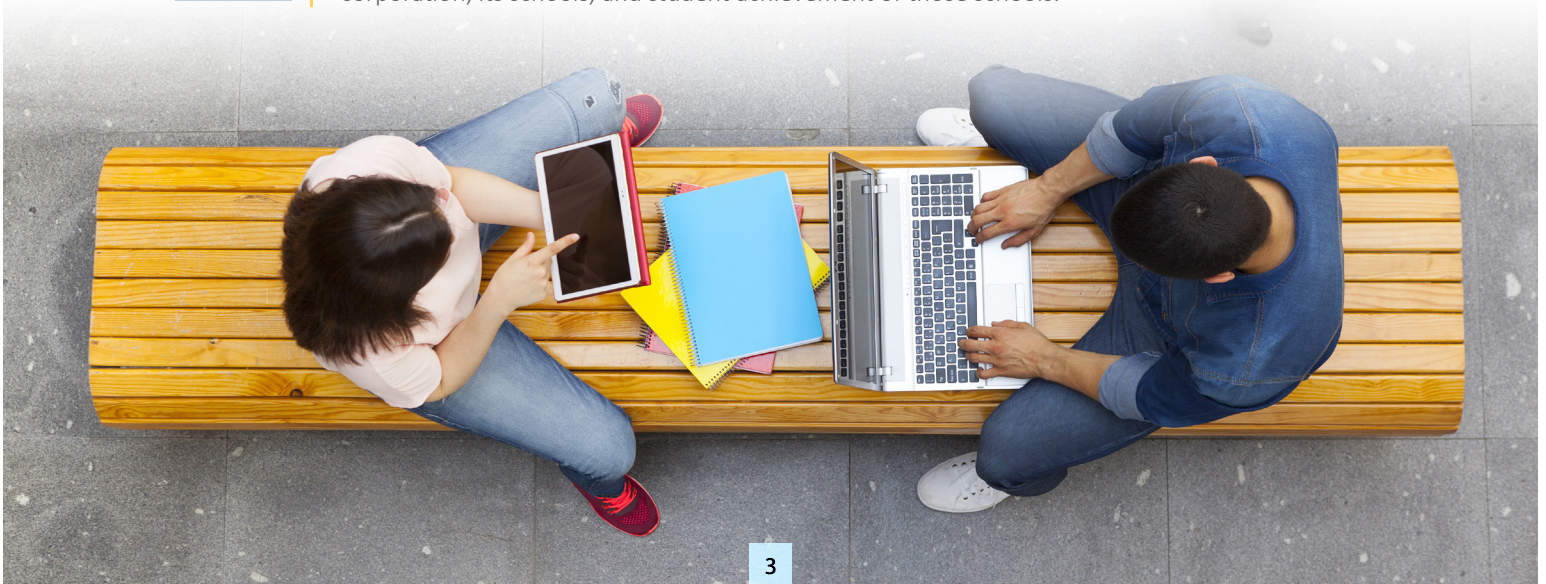
Additional information about the SUNY renewal process and an overview of the requirements for renewal under the New York Charter Schools Act of 1998 (as amended, the “Act”) are available on the Institute’s website at: www.newyorkcharters.org/renewal/.

RENEWAL QUESTIONS

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

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

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



RENEWAL RECOMMENDATION

Full-Term Renewal The Institute recommends that the SUNY Trustees approve the Application for Charter Renewal of Bronx Charter School for Excellence 2 and renew Bronx Charter School for Excellence’s authority to operate the school for a period of five years with authority to provide instruction to students in Kindergarten – 8th grade in such configuration as set forth in its Application for Charter Renewal with a projected total enrollment of 540 students.

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

REQUIRED FINDINGS

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

1:

the school, as described in the Application for Charter Renewal, meets the requirements of the Act and all other applicable laws, rules, and regulations;

2:

the education corporation can demonstrate the ability to operate the school in an educationally and fiscally sound manner in the next charter term; and,

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

4. SUNY Renewal Policies (p. 12).

3:

given the programs it will offer, its structure and its purpose, approving the school to operate for another five years is likely to improve student learning and achievement and materially further the purposes of the Act.⁵

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, gathered Continuity of Learning Plans from every school, and had ongoing communication to support and monitor programs. Bronx Charter School for Excellence 2 (“Bronx Excellence 2”) 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 school’s current program is outlined in the School Background section.

The Institute followed its typical renewal procedures where possible. Schools submitted the Application for Charter Renewal in August and included additional information regarding the Continuity of Learning Plans. The Institute team conducted its visit activities virtually and analyzed the school’s program using the SUNY Renewal Benchmarks. For remote learning, the Institute visit team joined virtual lessons to observe online learning and teaching. The Institute visit team conducted all interviews virtually including interviews with families, teachers, leaders, and the board.

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”),⁶ the Institute conducted a review of the SUNY Renewal Benchmarks with the standards and found that the SUNY 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 the school’s hybrid or remote learning model. In some instances, the Institute adjusted its indicators to reflect standards for online learning, where applicable.

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

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

ENROLLMENT AND RETENTION TARGETS

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, English Language learners ("ELLs"), and students who are eligible applicants for the federal Free and Reduced Price Lunch ("FRPL") program. The Institute examines each school's progress toward meeting or coming close to meeting its targets over the charter term as well as the efforts it has and will put in place to meet or continue to meet those targets.

Bronx Excellence 2 makes good faith efforts to recruit and retain students. The school meets its enrollment and retention targets for ELLs, and comes close to meeting its enrollment and retention targets for students who qualify for FRPL and students with disabilities. The operations team is primarily responsible for managing the school's enrollment and retention efforts and works closely with the Excellence Community Schools, Inc.'s ("Excellence Community Schools," the "network," or "CMO") marketing department to ensure that marketing strategies reach their intended audience. Over the past two years, Bronx Excellence 2's enrollment and retention rates have increased in all areas. The school will meet its targets in any future charter term by:

- attending open houses, public meetings, meet-and-greets, and presentations at various community organizations such as preschools, daycare centers, head start programs, English as a second language ("ESL") programs for adults with school aged children, county health centers, doctors' offices, libraries, family service providers, housing associations, counseling centers and support groups, tutoring groups, and places of worship;
- canvassing in local neighborhoods, especially in areas with high concentrations of public housing developments in close proximity of the school's location and multicultural communities;
- distributing fliers and applications in English, Spanish, and other prevailing languages in the community;
- marketing with local media outlets (newspapers, radio, and internet) that target both English and non-English speaking audiences, as well as free publications distributed in economically disadvantaged communities;

- providing bilingual staff members and interpretation and translation services to support recruitment efforts for prospective families who speak languages other than English;
- informing families of the school’s dedicated student support services department designed to advance the achievement of students with disabilities; and,
- hosting “family chats” with individual families upon enrollment to discuss expectations, student needs, and how Bronx Excellence 2 will service students’ unique need through their programming, particularly for families of students with disabilities and ELLs.

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

CONSIDERATION OF SCHOOL DISTRICT COMMENTS

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

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

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

BRONX CHARTER SCHOOL FOR EXCELLENCE 2

BACKGROUND

The SUNY Trustees approved the original charter for Bronx Excellence 2 on June 4, 2014. It opened its doors in the fall of 2016 initially serving 120 students in Kindergarten and 1st grade. The school is authorized to serve 360 students in Kindergarten – 5th 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 540 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's Kindergarten – 4th grade are located in private facilities at 1804 Holland Avenue, Bronx, NY in New York City Community School District ("CSD") 11 and the 5th grade is located at 1946 Bathgate Avenue, Bronx, NY in CSD 9. Bronx Charter School for Excellence ("Bronx Excellence Schools") contracts with Excellence Schools, a New York not-for-profit corporation, that supports Bronx Excellence 2 in the areas of curricula, student evaluation, recruitment, training, professional development, compliance, external relations, financial management, and technology. Excellence Schools manages a total of five schools throughout the Bronx, with the newest school having opened in the fall of 2019, and one school in Stamford, Connecticut. In addition to Bronx Excellence 2, Bronx Excellence Schools has the authority to operate Bronx Charter School for Excellence ("Bronx Excellence"), Bronx Charter School for Excellence 3, Bronx Charter School for Excellence 4, and Bronx Charter School for Excellence 5.

The mission of Bronx Excellence 2 is:



The Bronx Charter School for Excellence 2 prepares young people in New York City to compete for admission to and succeed in top public, private, and parochial high schools by cultivating their intellectual, artistic, social, emotional, and ethical development. The Bronx Charter School for Excellence 2 accomplishes this by offering a challenging and rigorous academic curriculum, which at the earliest of grades has an eye toward college preparation. The Bronx Charter School for Excellence 2 achieves this in a supportive and caring environment that maintains high expectations for all students.

SUMMARY OF COVID-19 RESPONSE

Bronx Excellence 2 used a phased approach to transition to remote learning. Immediately after the closure, the school ensured students had numerous materials such as workbooks, packets, and textbooks, while staff remained in close contact with students and families. Staff communicated daily with families to understand urgent needs. By mid-April, the school transitioned to app-based programs and academic assignments. Students continued to have daily interactions with staff and service providers via telephone or virtually. Bronx Excellence 2 also leveraged its community partnerships to raise funds for families. The school created a grocery store initiative, in collaboration with local grocers to establish a billable account to the school so that families in critical need could shop for essential items within a weekly budget. By mid-August 2020, the school had assisted over 40 families with groceries and impacted over 160 individuals.

Since the start of the 2020-21 school year, Bronx Excellence 2 implements a hybrid learning model when community COVID-19 cases are minimal. When the school is in its hybrid program, students attend in-person learning two days per week with remote instruction three days a week. The school offers families the option to remain fully remote. The school delivers its specials courses through synchronous learning times, and teachers use office hours blocks to address individual student needs. The school and network carefully monitor infection rates and families are aware that the school could transition to a full remote model if cases increases to a certain point.

The Institute's renewal review in November 2020 fell during a period of time when COVID-19 cases were increasing in many parts of New York City. At the time of the renewal review, the school transitioned to a fully remote program with the exception of its middle school program where some students remain hybrid. Due to the separate location of the middle school program, the school safely continued its hybrid program for students who opted in to it at the time of the renewal review.

The New York Forward Department of Health Reopening Plan for Bronx Excellence 2, developed in alignment with guidance from the New York State Department of Health, can be found at this [link](#).

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

During its initial charter term, Bronx Excellence 2 demonstrates academic success having met or exceeded its key Accountability Plan goals. The school demonstrates success in the following ways:

- Bronx Excellence 2 posted high absolute achievement in English language arts (“ELA”) and mathematics. In 2018-19, the school outperformed over 98% of schools statewide in both subjects.
- The school also demonstrated strong comparative achievement. In both ELA and mathematics, the school outperformed the district proficiency and performed higher than expected compared to demographically similar schools statewide.
- The school supports its at-risk students in achieving high rates of proficiency especially students with disabilities and ELLs. In 2018-19, students with disabilities outperformed their district peers in ELA and mathematics by 58 percentage points and 72 percentage points, respectively. Also that year, over half of the school’s ELLs increased at least one proficiency level or scored at the highest level on the New York State English as a Second Language Achievement Test (“NYSESLAT”). In 2019, among the 143 SUNY authorized charter schools that produced NYSESLAT data, Bronx Excellence 2 ranked in the top 4% in this measure.
- Bronx Excellence 2 replicates the program of the flagship school within the network, Bronx Excellence. In 2012, the U.S. Department of Education named Bronx Excellence a National Blue Ribbon School, the first school in the Bronx to receive this award and the highest honor for schools across the country.

Bronx Excellence 2 has a culture of high expectations for all students and staff members across the school. The school effectively analyzes formative and summative student achievement data to ensure that all students meet mastery levels. Teachers and leaders prioritize academic achievement within a highly supportive environment for students and families. Staff members demonstrate individualized attention to students in order to meet the school’s mission of preparing students for acceptance and success into top public, private, and parochial high schools across New York City. Bronx Excellence 2’s strong family culture leads leaders, teachers, and families to work in alignment toward the same high quality outcomes for students.

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H. Carl McCall SUNY Building
353 Broadway
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Based on the Institute’s review of the school’s performance as posted over the charter term; a review of the Application for Charter Renewal submitted by the school; a review of academic, organizational, governance, and financial documentation; and, a renewal review of the school’s academic program, the Institute finds that the school meets the required criteria for charter renewal.

The Institute recommends that the SUNY Trustees grant Bronx Excellence 2 an Initial Full-Term Renewal of five years.

NOTEWORTHY

Bronx Excellence 2 earned the distinction of being a 2019-20 Recognition School by New York State Education Department (“NYSED”) for high performance on state exams in its inaugural year of testing.

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ACADEMIC PERFORMANCE



IS THE SCHOOL AN ACADEMIC SUCCESS?

Bronx Excellence 2 is an academic success. During the charter term, the school has met or exceeded its key Accountability Plan goals. Based on evidence the Institute compiled throughout the charter term and at the time of the renewal review, Bronx Excellence 2's academic program is strong, effective, and supported by high quality instructional and organizational leadership.

At the beginning of the Accountability Period,⁷ the school developed and adopted an Accountability Plan that set academic goals in the key subjects of ELA and mathematics. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. The Institute examines results for five required Accountability Plan measures to determine ELA and mathematics goal attainment. The Act requires charters be held “accountable for meeting measurable student achievement results”⁸ and states the educational programs at a charter school must “meet or exceed the student performance standards adopted by the board of regents”⁹ for other public schools. SUNY's required accountability measures rest on performance as measured by statewide assessments. Historically, SUNY's required measures include measures that present schools’:

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

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

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

7. 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. In this renewal report, the Institute uses “charter term” and “Accountability Period” interchangeably.

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. Bronx Excellence 2 did not propose any additional measures of success in the Accountability Plan it adopted.

The Institute analyzes every measure included in the school's Accountability Plan to determine its level of academic success, including the extent to which the school has established and maintained a record of high performance, and established progress toward meeting its academic Accountability Plan goals throughout the initial charter term. Since 2009, the Institute has examined but consistently de-emphasized the two absolute measures under

8. Education Law § 2850(2)(f).

9. Education Law § 2854(1)(d).

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each goal in elementary and middle schools' Accountability Plans because of changes to the state's assessment system. The analysis of elementary and middle school performance continues to focus primarily on the two comparative measures and the growth measure while also considering the two required absolute measures and any additional evidence the school presents using additional measures identified in its Accountability Plan. The analysis of high school academic performance focuses primarily on absolute and comparative measures associated with the school's graduation and (for college preparatory programs) college preparation goals. The Institute identifies the required measures (absolute proficiency, absolute Measure of Interim Progress ("MIP") attainment,¹⁰ comparison to local district, comparison to demographically similar schools, student growth, and high school graduation and college going rates) in the Performance Summaries appearing in Appendix B.

The Institute analyzes all measures under the school's ELA and mathematics goals while emphasizing the school's comparative performance and growth to determine goal attainment. The Institute calculates a comparative effect size to measure the performance of Bronx Excellence 2 relative to all public schools statewide that serve the same grade levels and that enroll similar concentrations of economically disadvantaged students. It is important to note that this measure is a comparison measure and therefore any changes in New York's assessment system do not compromise its validity or reliability. Further, the school's performance on the measure is not relative to the test, but relative to the strength of Bronx Excellence 2's demonstrated student learning compared to other schools' demonstrated student learning.

The Institute uses the state's growth percentile analysis as a measure of Bronx Excellence 2's comparative year-to-year growth in student performance on the state's ELA and mathematics exams. The measure compares a school's growth in assessment scores to the growth in assessment scores of the subset of students throughout the state who performed identically on previous years' assessments. According to this measure, median growth statewide is at the 50th percentile. This means that to signal the school's ability to help students make one year's worth of growth in one year's time the expected percentile performance is 50. To signal a school is increasing students' performance above their peers (students statewide who scored previously at the same level), the school must post a percentile performance that exceeds 50.

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

10. During the 2017-18 school year, the state finalized and approved its Every Student Succeeds Act ("ESSA") plan. As such, 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 MIP.

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In response to the COVID-19 global pandemic, the New York State 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
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1A

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

Bronx Excellence 2 met its academic Accountability Plan goals in ELA and mathematics in its initial charter term. Although the school only produced one year of state testing results in 2018-19, it posted high absolute and comparative achievement in both subjects. Notably, the school exceeded the absolute target in both subjects in the first year it administered the state exams. As a result of the cancellation of the state exams in 2019-20, the school did not produce testing results in science or mean growth percentiles in its initial term. In the absence of the New York State exams for students in 3rd – 8th grade in 2019-20, the school administered assessments aligned to state standards on the IXL assessment platform to track student achievement in ELA and mathematics. That spring, students across all grades were 82% proficient in ELA and 87% proficient in mathematics as measured by the internal assessment. The school met its NCLB/ESSA goal.

The school met its ELA goal in its initial charter term posting high achievement in the first year the school generated state exam results. Bronx Excellence 2 exceeded the targets for the four available measures under its ELA goal. In 2018-19, 94% of the school's students in 3rd grade enrolled in at least their second year scored at or above proficiency, exceeding the absolute target of 75% by 19 percentage points and the district performance by 51 percentage points. In comparison to schools enrolling similar percentages of economically disadvantaged students across the state, Bronx Excellence 2 performed higher than expected to a large degree. Due to the cancellation of the state exams in 2019-20, the school did not yet generate mean growth percentiles to evaluate the growth measure included under its goal.

Bronx Excellence 2 also met its mathematics goal when it posted high achievement and exceeded the targets for all available measures under its goal in 2018-19. With 98% of the school's students in 3rd grade enrolled for at least two years scoring at or above proficiency, the school surpassed the absolute target of 75% by 23 percentage points and district achievement by 59 percentage points. Bronx Excellence 2 performed higher than expected to a large degree compared to schools across the state enrolling similar proportions of economically disadvantaged students. The school did not yet generate mean growth percentiles to evaluate the growth measure included under its goal.

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The New York State science exam is administered in the 4th and 8th grades. Bronx Excellence 2 enrolled students in 4th grade for the first time in 2019-20 and therefore did not generate data to evaluate attainment of its science goal based on the required measures. Notably, Bronx Excellence, which serves as the model for Bronx Excellence 2's academic program, consistently meets its science goal over its charter terms.

The school met its ESSA goal, remaining in good standing according to the state's accountability system over the charter term.

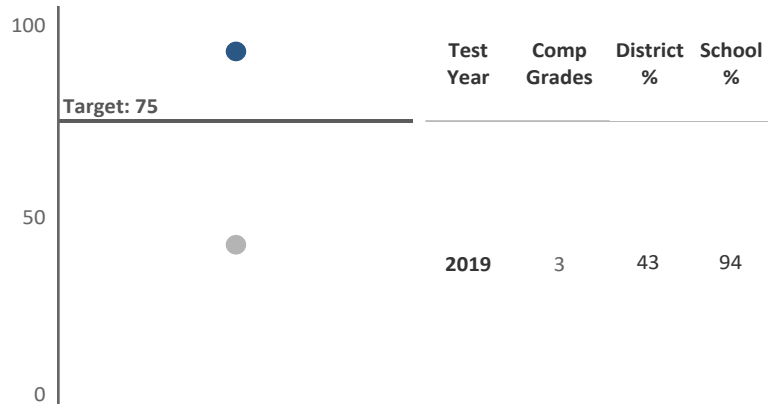
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ACADEMIC PERFORMANCE

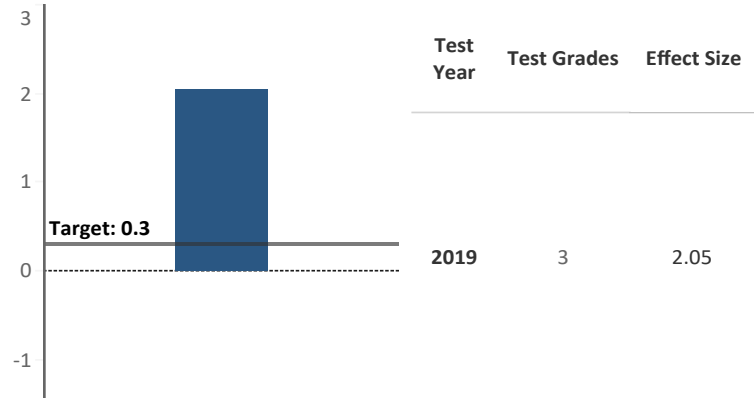
BRONX CHARTER SCHOOL FOR EXCELLENCE 2

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**.



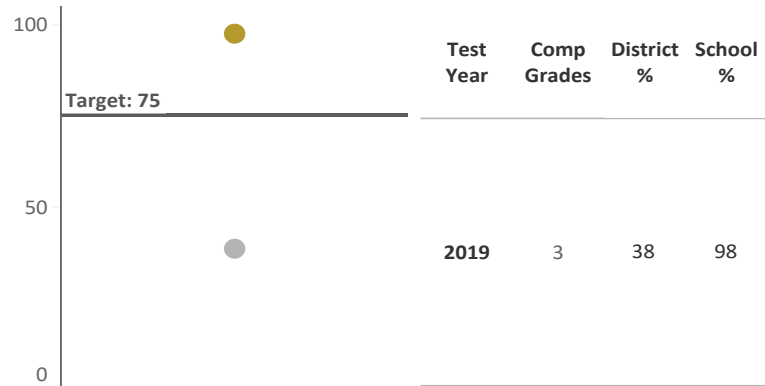
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ACADEMIC PERFORMANCE

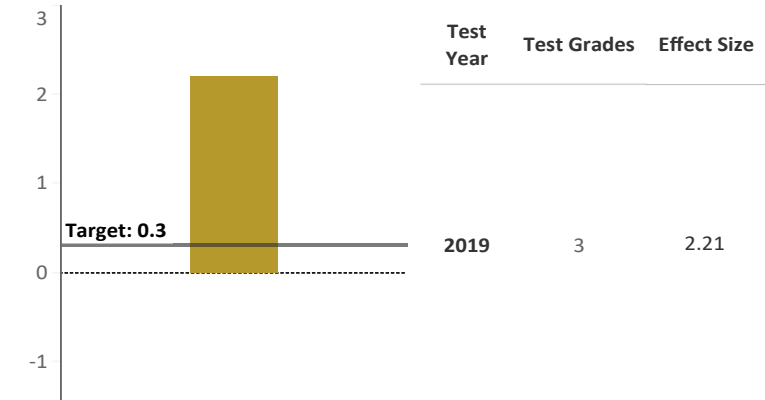
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MATHEMATICS ACCOUNTABILITY PLAN GOAL

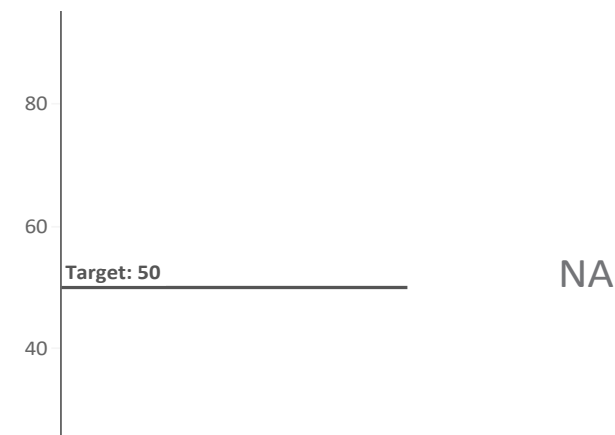
Comparative Measure: District Comparison. Each year, the percentage of students at **the school** in at least their second year performing at or above proficiency in Mathematics will be greater than that of students in the same tested grades in **the district**.



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



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



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ACADEMIC PERFORMANCE

BRONX CHARTER SCHOOL FOR EXCELLENCE 2

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.

NA

SPECIAL POPULATIONS PERFORMANCE

	2017	2018	2019
Enrollment Receiving Mandated Academic Services	16	18	32
Tested on State Exam	0	0	7
School Percent Proficient on ELA Exam	NA	NA	71.4
District Percent Proficient			13.3
	2017	2018	2019
ELL Enrollment	17	32	38
Tested on NYSESLAT Exam	5	32	36
School Percent 'Commanding' or Making Progress on NYSESLAT	s	21.9	52.8

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

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

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

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

**SUNY
RENEWAL
BENCHMARK
1B**

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

Bronx Excellence 2 has an assessment system that improves instructional effectiveness and student learning. The school administers valid and reliable schoolwide assessments three times each year to group students and create teaching strategies to meet students' needs. Teachers and leaders use daily and weekly formative assessments to urgently monitor student progress. Data from these regular, quick checks identify students for immediate intervention through tutoring, office hours, or an extra intervention period on the same day teachers administer the quiz. Teachers and instructional leaders for the school and the network analyze these data in weekly meetings to gauge the effectiveness of the curriculum and its delivery, making adjustments where necessary.

The school requires teachers to administer daily quick checks of student learning and respond to those data with urgency. Every lesson ends with an exit ticket that students complete. Teachers analyze those data immediately and identify students who need more time to grasp the lesson objective, assigning them to office hours or a small group intervention period later in the day. This year, Bronx Excellence 2 administers weekly quick checks in 2nd – 5th grades in ELA and mathematics. The weekly assessments provide teachers and leaders with data about lesson effectiveness and form a basis for comparing class performance across the network. These weekly checks provide another opportunity for teachers to intervene with students who are struggling to achieve lesson objectives or to meet standards. In previous years within the charter term, the school administered networkwide interim assessments, as well as mid-module assessments to gauge student mastery levels. Teachers also administer the Fountas and Pinnell Benchmark Assessment System ("F&P") reading assessment early and throughout the year to gauge students' reading levels. Teachers provide additional supports in lessons and during intervention lessons to struggling readers.

Bronx Excellence 2 has creative and effective systems in place to evaluate student work since the implementation of remote learning. Although assessing writing is challenging during remote instruction, the school provides actionable feedback to students. For instance, teachers require students to read their writing products aloud to teachers or to student peers in small groups while teachers or students provide feedback on writing products in real time. Notwithstanding the challenges of remote collaboration, teachers practice and align their application of grade level rubrics from the curriculum. Teachers meet with students earning low scores on the writing rubric in small groups to conduct mini writing workshops.

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Benchmark assessments embedded in the school's curricular materials give teachers and leaders data and information on academic attainment at the end of each unit. Leaders and teachers analyze these data closely, identifying items that students either mastered or did not master. Teachers then correlate trends in these data with classroom observation information to revise and improve lesson delivery. During scheduled re-teach sessions, teachers review lesson material with students using the revised techniques. Leaders observe the re-teach sessions and coach teachers in real time to effectively improve instructional tactics and meet student needs.

Bronx Excellence 2 administers the NWEA MAP ("MAP") assessments in ELA and mathematics three times yearly to monitor schoolwide progress toward learning goals. The school also utilizes F&P to gauge students' reading levels. Teachers provide information to school leaders about areas where the curriculum needs improvement based on data they collect from the school's variety of ongoing assessments. Data from these assessments inform school and network leaders in its process for adjusting the school's curriculum.

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

Bronx Excellence 2 has a curricular framework and supplemental materials that support teachers in their instructional planning. The network provides supplemental curricular materials for the school's commercial curricular programs. Instructional leaders use assessment and lesson observation data to closely monitor the effectiveness of the curricula.

Bronx Excellence 2 has effective curricular materials in place to support teachers to deliver instruction. The school uses the Journeys program in ELA and Eureka Math to guide its mathematics instruction. The school bases its science curriculum on FOSS and aligns to the Next Generation Science Standards. In each content area, the network provides schools in the education corporation with materials that instructional leaders and teachers at Bronx Excellence 2 use to know what to teach and when to teach it, including scope and sequence documents, pacing calendars, and unit plans. Teachers refer to these documents in meetings prior to the start of each new unit to link unit plans to learning targets and state standards. Planning backwards from the goals, teachers examine lesson plans and create strategies for instruction. Throughout a unit during grade team meetings, teachers develop specific lesson plans and develop supplemental teaching supports, such as visual supports and presentation slides, to meet the needs of the unique learners in each class.

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The school is reflective about the curriculum and supporting documents. Instructional leaders and teachers meet frequently to discuss the effectiveness of the curriculum. During lesson planning, teachers in Kindergarten – 2nd grade rehearse lessons and make adjustments to planned instruction before teaching in the classroom. In the upper elementary grades, teachers submit lesson plans to instructional leaders and receive feedback prior to teaching. Across all grades, teachers provide feedback to principals about the effectiveness of lessons as they plan and after collecting assessment data following the lesson. Principals inform network instructional leaders about necessary changes during regular networkwide meetings. The network adjusts planning documents to improve the effectiveness of future lessons based on this feedback cycle.

IS HIGH QUALITY INSTRUCTION EVIDENT THROUGHOUT THE SCHOOL?

Elements of high quality instruction are evident at Bronx Excellence 2. The school started the 2020-21 school year in a hybrid model of in-person and remote instruction, and at the time of the Institute's visit, the school had recently transitioned to a fully remote model in the majority of grades due to the rising number of COVID-19 cases across New York City. During the virtual renewal review, the Institute team observed 17 synchronous lessons across all subject areas and grades following a defined protocol used for school visits during the period of time that schools implement remote learning models.

For remote instruction, school and network leaders prioritize maintaining a positive and supportive staff member and student culture. Leaders and teachers support families in arranging the home environment for learning in order to maximize students' daily learning environment. Teachers are intentionally flexible with lesson pacing, slowing down when necessary to engage or support students.

Teachers use virtual learning procedures specific to the age or grade level of students and the network has designed lessons for teachers to use technology strategically. For example, 5th grade teachers prompt students to use the chat to encourage interaction, while Kindergarten – 4th grade teachers primarily ask students to respond verbally or by holding their work up to the camera.

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Teachers effectively check for understanding after a lesson. Students record exit tickets and homework in notebooks, then take a picture, and upload it to Google Classroom. Lessons are purposeful, and teachers' instruction is aligned to state standards and objectives in the lesson plan. School leaders provide coaching and lesson plan feedback on teachers' questioning strategies and recognize the need to ensure all teachers effectively gauge students' understanding during a lesson and engage students in higher order thinking.

DOES THE SCHOOL HAVE STRONG INSTRUCTIONAL LEADERSHIP?

Bronx Excellence 2 has strong instructional leadership. The instructional leadership consists of two principals and a principal resident. The school has robust systems in place for coaching and its professional development program. Leaders set clear expectations for teacher performance, and teachers appreciate the level of support that leaders provide to develop instructional practices. Leaders use consistent coaching cycles aligned to individual teachers' professional goals and the Danielson Framework for Teaching in order to achieve high outcomes for all students.

Bronx Excellence 2's leaders establish an environment of high expectations for teachers' personal, professional growth and in the belief that all students can succeed. The principals and principal resident are responsible for supporting the growth and development of the teachers, as well as evaluating all teachers. Instructional leaders provide sustained, systemic coaching and development that improves teachers' instructional effectiveness. The principals and principal resident conduct regular informal observations of teachers with written or verbal follow up, as well as weekly one on one meetings with teachers. Teachers submit lesson plans to leaders weekly and receive written or verbal feedback they incorporate prior to teaching the lesson. Instructional leaders are in classrooms several times per week. The school uses the Danielson Framework for Teaching to conduct teacher evaluations, with two formal observations per year. Leaders include all of their feedback in Whetstone, an online classroom observation platform, in order to monitor teacher progress over time.

The school's professional development program develops the content knowledge and pedagogical practice of all teachers. Instructional leaders design the school's professional development plans to align with identified needs based on teacher observations. While the majority of professional development sessions come from the network's academic team, instructional leaders develop teachers' skills in applying the concepts to their classroom directly. For example, teachers received training on using Illuminate to look at student assessment data and spent additional time with the principals to identify student trends and adjust classroom instruction.

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Instructional leaders provide opportunities and guidance for teachers to plan curriculum and instruction within grade levels. Teachers have weekly common grade team meetings. During these meeting times, teachers review upcoming assessments, discuss student data, create action plans, and co-plan lessons. The school designates additional time for curriculum and instructional planning during pre-service and weekly professional development sessions.

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

Bronx Excellence 2 effectively supports students with disabilities, ELLs, and students who struggle academically. The network director of student services oversees and supports the school's programs.

Bronx Excellence 2 has effective systems for identifying students in need of additional academic support, students with disabilities, and ELLs. Teachers urgently monitor student assessment data, including MAP, F&P, and weekly and daily formative assessments, and use the data to identify struggling students. If students continue to struggle with academic content following immediate intervention, teachers engage in next steps depending on particular student needs. If students are generally falling behind, teachers submit a form to their respective principal requesting deeper analysis of student performance during monthly child study team meetings. The child study team assigns students to intervention blocks as appropriate. Intervention blocks are tiered by intensity of supports students need. If students in the highest tier do not benefit from the intervention, the school works with the district committee on special education to initiate the process to evaluate students for special education services. Bronx Excellence 2 relies on the Home Language Identification Survey and, if appropriate, the New York State Identification Test for English Language Learners ("NYSITELL") to identify English language learners. This year, in the absence of the NYSITELL due to the COVID-19 pandemic, the school relies on the home language survey, interviews, and conversations with families to identify new ELLs. Teachers also closely monitor F&P reading levels and performance on ELA assignments to identify potential ELLs.

Bronx Excellence 2 meets the needs of students with disabilities in its integrated co-teaching settings and with related services that district consultants provide. Special education and general classroom teachers use data from various assessments and F&P reading levels to plan differentiation strategies during grade level planning meetings that include special education teachers. Co-teachers implement the planned strategies in lessons, including small group work and frequent individual check-ins. Grade teams use F&P data to adjust the membership of small groups to ensure student needs and the intensity of the supports align. General

and special education teachers regularly monitor student data in grade team meetings to ensure students with disabilities make progress toward Individualized Education Program (“IEP”) goals and the school’s overall learning targets. In 2018-19, the most recent year with available data, Bronx Excellence 2’s proficiency rate among students with disabilities was 71% in ELA and 86% in mathematics, far exceeding the district’s and state’s proficiency rates in the same subjects for all students at grade level.

Bronx Excellence 2 supports ELLs in an English immersion program. Teachers receive professional development over the summer and throughout the year on the school’s research based practices for supporting ELLs in the general education setting. The network’s director of student support services observes lessons during the year and provides feedback to teachers on their implementation of ELL supports to ensure fidelity to best practices. Teachers effectively use visual supports, closely monitor student work products and data, emphasize and repeat academic vocabulary, and confer individually with ELLs to ensure their language acquisition progress. In spring 2019, 19 out of 56 ELLs tested at the commanding proficiency level on the NYSESLAT, the highest proficiency level demonstrating command of English, ranking in the top 4% of the 143 SUNY authorized charter schools that produced NYSESLAT data. Despite the cancellation of the spring 2020 administration of the NYSESLAT, the school continues to support all identified ELLs and potential ELLs in its immersion program in the 2020-21 school year.

Teachers at Bronx Excellence 2 understand the school’s culture of vigilant caring and responsibility for students, and the belief that every student is the responsibility of every adult in the school. Through that lens, students interact with various intervention and classroom teachers to receive the support they need to attain high levels of academic achievement. Teachers’ close monitoring of data and swift response to low student performance ensures students have the support they need to meet learning objectives. Students who struggle to achieve on daily and weekly assessments attend office hours, tutoring, or other quick intervention blocks with teachers who ensure they do not fall behind expectations. Students who continue to struggle attend regular intervention blocks. Teachers design lessons in intervention blocks to target specific skills or concepts where students need extra support. The least intensive intervention blocks meet three times a week while the most intensive intervention blocks may meet multiple times each day.

The network provides regular internal professional development for the whole staff on best practices to supports struggling learners, students with disabilities, and ELLs in their classroom settings. The network’s director of student services delivers or coordinates several sessions each year to ensure teachers understand best practices. The director of student support services also observes lessons and provides feedback to teachers and principals on the effective implementation of strategies to support all learners.

ORGANIZATIONAL PERFORMANCE



IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

Bronx Excellence 2 is an effective and viable organization that has in place the key design elements identified in its charter. The Bronx Excellence Schools’ board of trustees (the “board”) meets regularly and ensures the school substantially complies with applicable law and regulations. Additional detail on the school’s organizational effectiveness is outlined below.

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

Bronx Excellence 2 is faithful to its mission and key design elements. These can be found in the School Background section at the beginning of the report and Appendix A, respectively. Bronx Excellence 2 maintained its dedication to students and families throughout its hybrid and remote programming by delivering on its mission to cultivate students’ intellectual, social, emotional, and ethical development through rigorous coursework and engaging content.

ARE PARENTS/GUARDIANS AND STUDENTS SATISFIED WITH THE SCHOOL?

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

Parent Survey Data. The Institute compiled data from the New York City Department of Education’s (“NYCDOE’s”) 2018-19 NYC School Survey. NYCDOE distributes the survey every year to compile data about school culture, instruction, and systems for improvement. This year, 100% of families who received the survey responded. The majority of respondents (93%) indicated satisfaction with the school’s program, and the high response rate is more than sufficient to be useful in framing the results as representative of the school community.

Parent Focus Group. The Institute asks all schools facing renewal to convene a representative set of parents for a focus group discussion. For renewal reviews in 2020-21, the Institute convened families in a virtual environment. A representative set includes parents of students in attendance at the school for multiple years, parents of students new to the school, parents

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of students receiving general education services, parents of students with special needs, and parents of ELLs. The 11 families in attendance expressed high levels of satisfaction with the school's program particularly with regard to individualized supports for students. Families appreciate that teachers and school leaders communicate consistently about student progress and grades, as well as frequent check-ins regarding the families' needs. The families also shared that they were grateful for the school, when handling the transition to remote learning and for being accessible for any questions or concerns. A few middle school level families expressed concern that the distance of the middle school building from the elementary school building could be challenging for families.

Persistence in Enrollment. An additional indicator of parent satisfaction is persistence in enrollment. In 2019-20, 91% of Bronx Excellence 2 students returned from the previous year. Student persistence data from previous years of the charter term is available in Appendix A.

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

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

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Bronx Excellence 2 effectively supports the delivery of the educational program and monitors the social and emotional well being of students, families, and staff members. The school has an administrative structure that enables the school to implement key elements of the academic program. Leaders have clearly defined roles and responsibilities, and team members understand their roles and responsibilities. The director of operations works closely with the principals and network staff to ensure that teachers and students have the necessary materials for academic success. The director of operations continues to oversee all duties related to facilities, supplies, and the school's budget.

Leaders at Bronx Excellence 2 align the goals of the broader organization with the goals of each individual teacher within the school in order to ensure consistent positive growth. All staff members have goals and clear lines of accountability that align and prioritize the responsibilities of each role. The Bronx Excellence Schools board oversees the Excellence Schools chief executive officer ("CEO") and the chief schools and innovation officer ("CSIO"). The CSIO oversees the leadership team at the school level. School leaders manage school staff members, including teachers. As the entire organization expands, the organization is prioritizing principals' development to support one another across the five growing schools in the network.

Bronx Excellence 2 retains quality staff. In the 2020-21 school year at Bronx Excellence 2, the entire teaching staff returned to their positions. Bronx Excellence Schools intentionally staffs its middle school grades with staff from the elementary levels. For example, the principal resident was a teacher and academic dean at another elementary school within the network prior to opening the middle school level at Bronx Excellence 2. This strategy allows Bronx Excellence Schools to maintain its organizational culture.

Bronx Excellence 2 has sufficient resources to support the achievement of its accountability and organizational goals. When the schools transitioned to remote learning in spring 2020 due to the COVID-19 pandemic, the school provided the necessary technology to students in need of the proper devices. Bronx Excellence 2 maintains its fiscal health, and this year has a waitlist of over 800 applicants.

Leaders and teachers at Bronx Excellence 2 are thoughtful about areas where the school needs to develop capacity and make programmatic adjustment. Principals work with network level staff weekly to discuss areas of concern. For instance, instructional leaders at the CMO and school closely monitored the implementation of the Eureka curriculum and student achievement data when the school shifted the math program earlier in the charter term. Simultaneously, the school's leaders and teachers work with counselors to monitor and maintain the social and emotional health of the school's students, families, and teachers. Regular check-ins and supports ensure that the school community has what it needs to maintain stability.

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

The Bronx Excellence Schools board works effectively to achieve the schools Accountability Plan goals. Board members operate a committee structure with regular meetings of the finance, executive, and development committees with each committee reporting out information to the full board. The board recognizes the need to have its education committee meet regularly and provide similar reports to the full board. The board relies heavily on the network for meeting and reporting out on the school's academic goals. The network regularly provides the board with dashboards that include information on the school's academic program, student demographic information, and fiscal health.

Board members establish priorities and long term goals. The board's current priorities include ensuring high student achievement via remote learning and ensuring the network is properly preparing itself for Bronx Excellence 2's expansion to middle school grades, if approved. The Bronx Excellence Schools board meets with the Excellence Schools network board three times per year to maintain mission alignment and a strong working relationship.

The board evaluates its performance and that of the CMO, CEO, and CSIO. Board members are highly satisfied with the CMO's performance and monitors finance data closely to ensure fiscal health while the CMO expands in New York and Connecticut. Board members possess a variety of skills and desire to add additional board members who are members of the community.

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

The board materially and substantially implements, maintains, and abides by appropriate policies, systems, and processes to ensure the effective governance and oversight of the school. The board demonstrates a clear understanding of its role in holding the school leadership and management organization accountable for both academic results and fiscal soundness.

- The school is the board's first replication of the original program at Bronx Excellence. At the time of this replication the board and school leadership worked to delineate the roles of the education corporation board, the emerging CMO, and its board. The Bronx Excellence Schools board has worked effectively to delineate these roles but has also understood the opportunities for collaboration and joint governance. The board provides input into the CMO's evaluation of CMO leadership, and regular joint meetings allow the board to ensure strategic alignment.
- The board has created more robust data reporting systems to effectively communicate with the CMO as the organization has grown.
- The board regularly reviews and updates policies.
- The board implements a comprehensive conflict of interest policy and generally avoids conflicts of interest.
- The board implements a process for dealing with informal and formal complaints.

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- Minutes reflect the board abides by its by-laws and holds meetings in accordance with the Open Meetings Law.
- Reflective about its membership, the board strives to include more community members from the communities the organization has expanded into, aligning governance to the original mission.

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

The education corporation substantially complied with applicable laws, rules and regulations, and provisions of its charter. During the current charter term, the education corporation demonstrates a clear record of compliance with the terms of its charter including the timely submission of required reporting to the Institute.

- **Annual Reports.** Although the education corporation submitted its annual reports to the Institute and NYSED on time and posted portions of the annual reports on the school website in accordance with the charter and the Act, the school has not posted the most recent independent fiscal audits which are a part of the annual report. The Institute will ensure compliance prior to the start of the next charter term.
- **Complaints.** The Institute did not receive any formal complaints regarding the school during the charter term.
- **Compliance.** The Institute issued no violation letters specific to this school during the charter term.
- **FOIL.** Minor information in the Bronx Excellence Schools New York Freedom of Information Law (“FOIL”) notice on the CMO’s website needs to be aligned with the posted FOIL policy.

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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, Bronx Excellence Schools is fiscally sound as is its school, Bronx Excellence 2. The SUNY Fiscal Dashboard presents color-coded tables and charts indicating that Bronx Excellence 2 and the education corporation have demonstrated fiscal soundness over the majority of the charter term.¹¹ (The SUNY Fiscal Dashboard for Bronx Excellence 2 is included in Appendix D and the Fiscal Dashboard for the Bronx Excellence Schools combined education corporation is included in Appendix F). The discussion that follows relates mainly to the Bronx Excellence Schools education corporation because a school is not a legally distinct fiscal entity.

The network supports Bronx Excellence 2 in the areas of curriculum, student evaluation, recruiting, training, professional development, financial management, and technology under the terms of a management contract that reflects 13% annual management fee over the charter term. Leaders intend the financial model to ensure a fully enrolled school is financially sustainable, operating the academic program solely through public funding.

Bronx Excellence 2 opened in 2016-17 authorized by SUNY and part of the Bronx Excellence Schools education corporation. The education corporation now has the authority to operate a total of five charter schools all authorized by SUNY. In addition to analyzing the soundness of the individual charter school, the Institute analyzes the soundness of the not-for-profit education corporation granted the authority to operate the school, and finds it too has adequate financial resources to ensure stable operations.

In response to the COVID-19 situation, Bronx Excellence Schools proactively budgeted FY 2020-21 conservatively by projecting decreased revenues and lowering expenses while projecting additional costs for remote learning technologies and building safety measures to comply with socially distanced in-person learning. The education corporation anticipates enrollment to remain steady, and budgets conservatively to maintain continued financial stabilization.

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

Bronx Excellence 2 has adequate financial resources to ensure stable operations. Working with the network, the school has employed clear budgetary objectives and budget preparation procedures throughout the charter term.

- The budget process involves the school leadership and network, with input from the financial consultant, to develop each school's budget using a model designed to achieve self-sufficiency of unique requirements of any particular program offered without the use of private philanthropy. The school bases the budgets on historical actual revenues and expenses and programmatic changes to ensure that the staff can properly support the proposed enrollment.
- The projected five year renewal budget reflects anticipated stable revenues and expenses associated with planned enrollment as the school grows to serve Kindergarten – 8th grade.
- Bronx Excellence 2 operates the elementary school in a privately leased location. Currently, the 5th grade is housed at a location housing another one of Bronx Excellence Schools' programs. The education corporation is currently searching for a facility to permanently house the middle school program, if renewed. The current elementary facility provides ample space for the school to continue operations during the next charter term.

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DOES THE SCHOOL MAINTAIN APPROPRIATE INTERNAL CONTROLS AND PROCEDURES?

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

- The Bronx Excellence Schools' Fiscal Policies and Procedures Manual serves as the guide to all financial internal controls and procedures. The manual undergoes ongoing reviews and updates.
- The most recent Bronx Excellence Schools audit report has no material findings or deficiencies.

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DOES THE SCHOOL COMPLY WITH FINANCIAL REPORTING REQUIREMENTS?

Bronx Excellence 2 and the education corporation comply with financial reporting requirements.

- The Institute and NYSED received the required financial reports on time, complete, and following generally accepted accounting principles (GAAP).
- Auditors give the independent audits of annual financial statements unqualified opinions with no advisory or management letter findings to report.
- The school and education corporation generally file key reports in a timely and accurate manner including audit reports, budgets, unaudited quarterly reports of revenue, expenses, and enrollment.
- The June 30, 2020 annual audit reflects continued strong fiscal health of the school and the combined education corporation.

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

Bronx Excellence 2 and the education corporation maintain adequate financial resources to ensure stable operations.

- Since the school opened in 2016-17, the school reports operating surpluses in each year of the charter term.
- The combined education corporation fiscal dashboard in Appendix F reflects fiscally strong with 7.6 months of cash on hand to pay liabilities coming due shortly.
- The education corporation benefits from a combined balance sheet, which is a combination of individual schools' assets and liabilities. In order to track the operations of any individual school within a merged education corporation, the Institute tracks each individual school's revenues and expenses in order to report operating surpluses or deficits.
- The education corporation as a whole had total net assets of approximately \$26.1 million as of June 30, 2020 and had approximately \$17.3 million in cash on hand. Bronx Excellence 2 had \$5.1 million in net assets as of June 30, 2020.
- As a requirement of the SUNY charter agreement, Bronx Excellence established a separate bank account for the dissolution fund reserve with the required \$225,000 for the five operating charters as of June 30, 2020.

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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?

Bronx Excellence Schools' plans for the school are reasonable, feasible, and achievable. Bronx Excellence 2 plans to expand to serve students in Kindergarten – 8th grade in the next charter term.

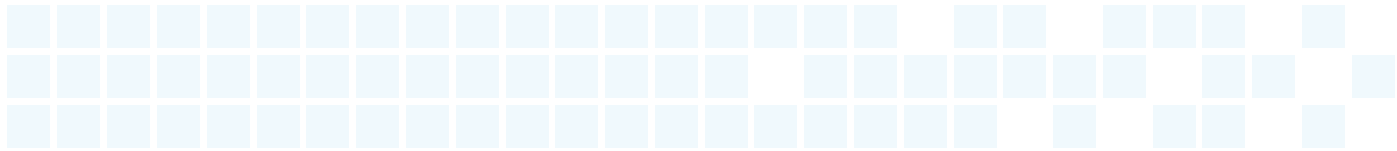
Plans for the School's Structure. The education corporation has provided all of the key structural elements for a charter renewal and those elements are reasonable, feasible, and achievable.

Plans for the Educational Program. Bronx Excellence 2 plans to continue to implement the same core elements of its educational program that enabled the school to meet its key Accountability Plan goals during the current charter term. The school will model its middle school program on the successful program in use at Bronx Excellence. These core elements are likely to enable to school to meets its goals in any future charter terms.

Plans for Board Oversight & Governance. Board members express an interest in continuing to serve Bronx Excellence Schools in the next charter term. The board may add additional members with a geocentric focus in the future.

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

	CURRENT	END OF NEXT CHARTER TERM
Enrollment	360	540
Grade Span	K-5	K-8
Teaching Staff	20	39
Days of Instruction	182	182



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Bronx Excellence 2 operates the elementary school in a privately leased location. Currently, the 5th grade is housed at the location housing another one of Bronx Excellence Schools' programs. The education corporation is searching for a facility to permanently house the middle school program. The current elementary facility provides ample space for the school to continue operating the elementary program during 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.



Bronx Excellence 2

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APPENDICES

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FISCAL DASHBOARD

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ED CORP FISCAL

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APPENDIX A: School Overview

BRONX CHARTER SCHOOL FOR EXCELLENCE BOARD OF TRUSTEES WITH AUTHORITY TO OPERATE BRONX CHARTER SCHOOL FOR EXCELLENCE 2

CHAIR	TRUSTEES
Kathy Lathen	Stacey Lauren
VICE CHAIR	Kenneth Adams
Joyce Frost	Alexandra Nestor, pending approval
TREASURER	
Joe Lewis	
SECRETARY	
Mardi Schechter	

EXCELLENCE COMMUNITY SCHOOLS, INC., BOARD OF TRUSTEES

CHAIR	TRUSTEES
Joyce Frost	Kory Apton
VICE PRESIDENT	William Geist
Kim Hartman	
VICE PRESIDENT	
Andra Ehrenkranz	
TREASURER	
Rishi Renjen	
SECRETARY	
Anthony Vernace	

SCHOOL LEADERS

PRINCIPAL
<i>Sharleen Morris, Kindergarten – 2nd grade Principal (June 2017-Present)</i>
<i>Adije Okpo, 3rd – 4th grade Principal (July 2018-Present)</i>
<i>Jovan Newkirk, 5th grade Principal Resident (July 2020-Present)</i>
<i>Aleisha Rodriguez, Founding Principal (July 2016-July 2017)</i>

SCHOOL CHARACTERISTICS

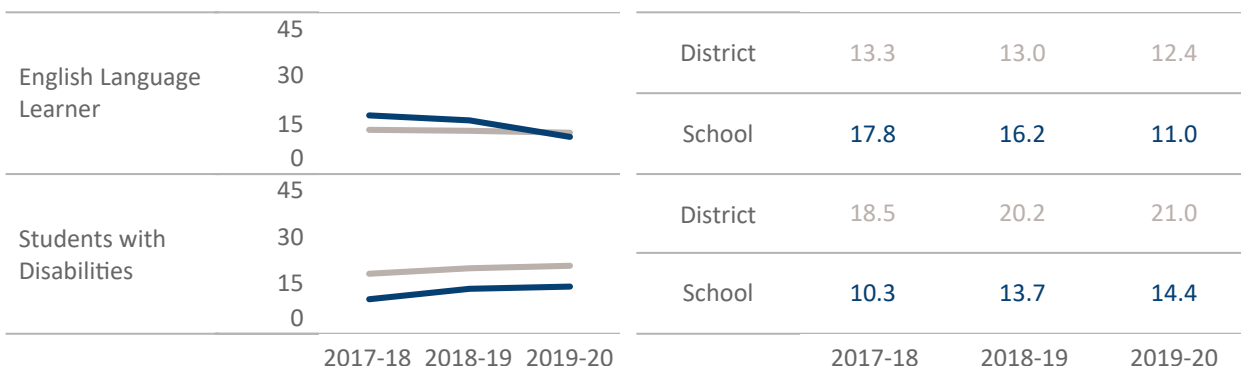
SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2016-17	120	118	98%	K-1
2017-18	180	178	99%	K-2
2018-19	240	238	99%	K-3
2019-20	300	295	98%	K-4
2020-21	360	346	96%	K-5

APPENDIX A: School Overview

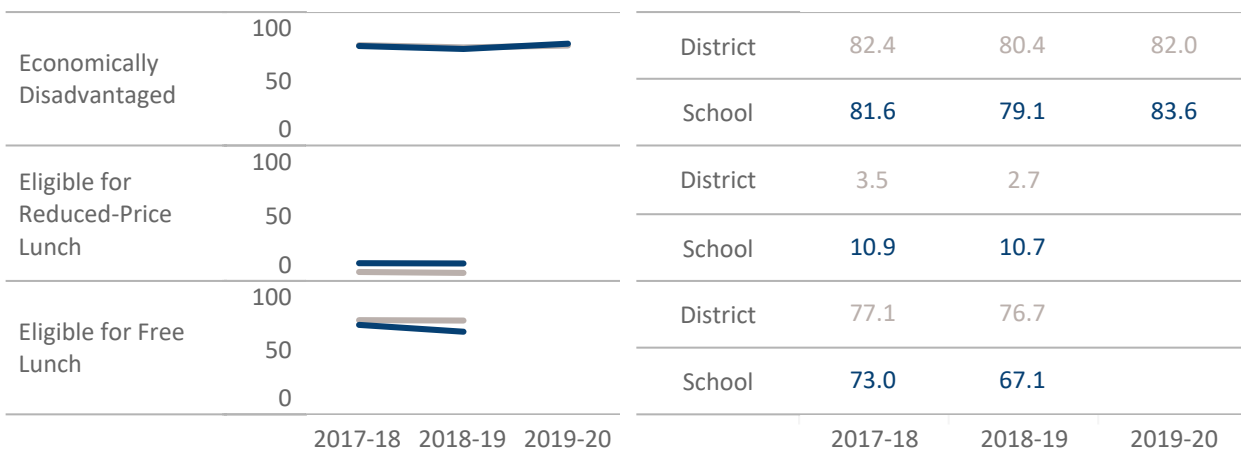
Bronx Charter School for Excellence 2

Bronx CSD 11

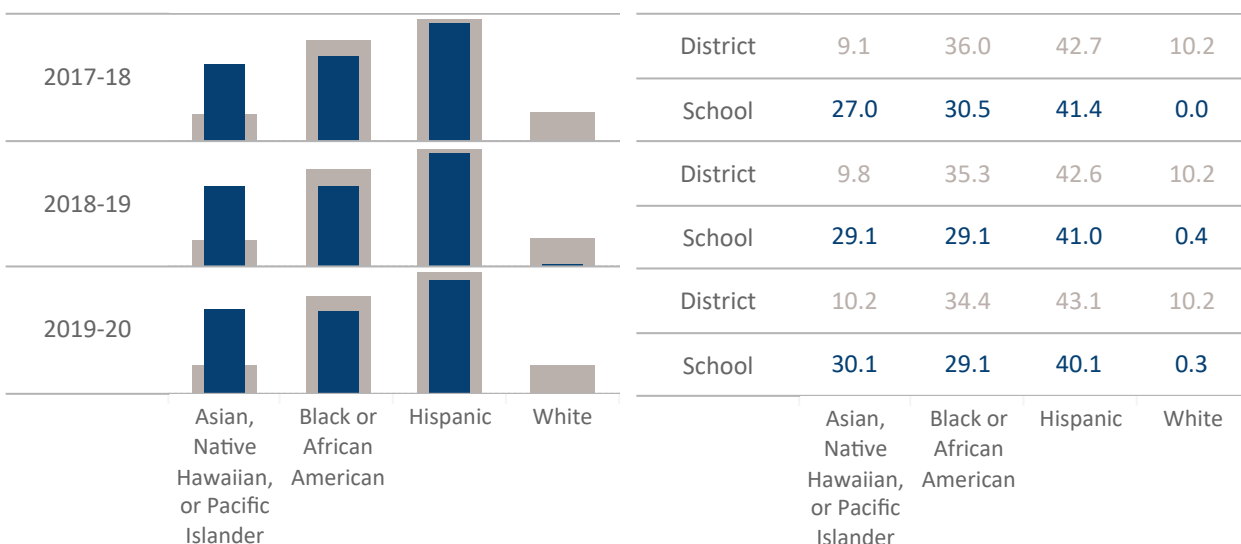
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



Student Demographics: Race/Ethnicity

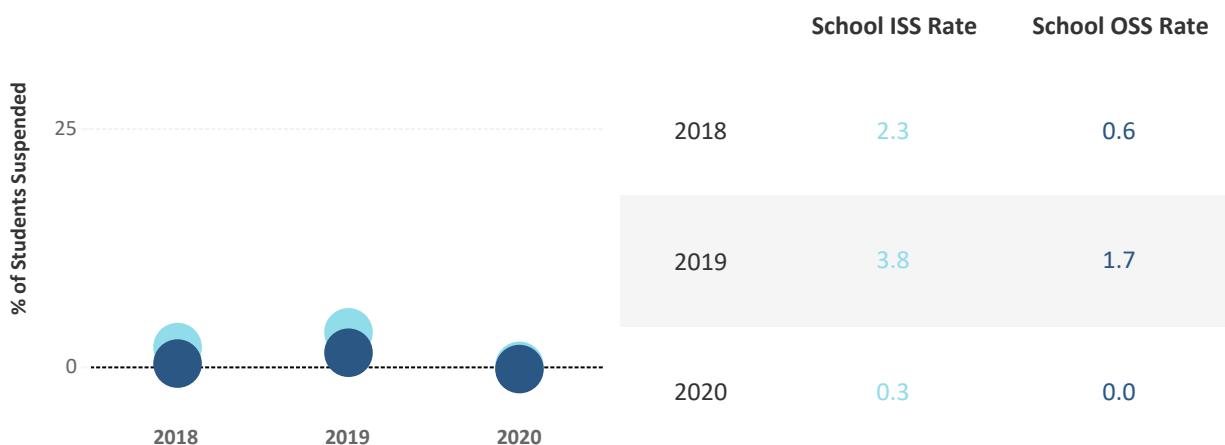


Data reported in these charts reflect BEDS day enrollment counts as reported by the New York State Education Department

APPENDIX A: School Overview

Bronx Charter School for Excellence 2

Bronx CSD 11



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

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



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

2018	2019	2020
0	0	0

Bronx Charter School for Excellence 2's Enrollment and Retention Status: 2019-20

			Target	School
enrollment	economically disadvantaged		85.8	83.3
	English language learners		9.5	11.7
	students with disabilities		16.5	14.4
retention	economically disadvantaged		91.0	89.2
	English language learners		91.1	94.7
	students with disabilities		91.4	81.3

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

APPENDIX A: School Overview

PARENT SATISFACTION: SURVEY RESULTS

RESPONSE RATE	OVERALL SATISFACTION	TRUST	EFFECTIVE SCHOOL LEADERSHIP	STRONG FAMILY COMMUNITY TIES
100%	93%	95%	92%	93%

TIMELINE OF CHARTER SCHOOL RENEWAL



SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2016-17	First Year Visit	May 10, 2017
2020-21	Initial Renewal Visit	November 30-December 3, 2020

CONDUCT OF THE RENEWAL VISIT

DATE(S) OF VISIT	EVALUATION TEAM MEMBERS	TITLE
November 30-December 3, 2020	Kerri Rizzolo	Senior Analyst
	Katherine Malitzky	School Evaluation Analyst
	Jeff Wasbes	Executive Deputy Director for Accountability

APPENDIX A: School Overview

KEY DESIGN ELEMENTS:

ELEMENT	EVIDENT?
High academic standards;	+
A broad liberal arts education;	+
Foundational academic and critical thinking skills that expand to a 21st century global perspective;	+
Longer school day;	+
Performance-based compensation for staff;	+
Clearly articulated standards for students that encourage holistic growth;	+
School uniforms for students;	+
A commitment to academic performance accountability;	+
A commitment to financial accountability;	+
Parent engagement;	+
Open collaboration with the community of educators and external stakeholders; and,	+
Organizational commitment to lifelong learning and to the professional development of all staff.	+

APPENDIX B: Performance Summaries

SCHOOL PERFORMANCE SUMMARY: ENGLISH LANGUAGE ARTS

Bronx Charter School for Excellence 2

2016-17 Grades Served K-1					2017-18 Grades Served K-2					2018-19 Grades Served K-3								
Grades	All % (N)	2+ Years % (N)	MET		Grades	All % (N)	2+ Years % (N)	MET		Grades	All % (N)	2+ Years % (N)	MET					
Absolute Measure	3	()	()		3	()	()			3	91.5(59)	93.5(46)						
	4	()	()		4	()	()			4	()	()						
	5	()	()		5	()	()			5	()	()						
	6	()	()		6	()	()			6	()	()						
	7	()	()		7	()	()			7	()	()						
	8	()	()		8	()	()			8	()	()						
	All	()	()		All	()	()			All	91.5(59)	93.5(46)		YES				
	Grades	PI	AMO		Grades	PI	MIP			Grades	PI	MIP						
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	198	105	YES	YES
Comparative Measure	Comparison:				Comparison:				Comparison: Bronx CSD 11									
	Grades	School	District		Grades	School	District		Grades	School	District							
	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES			
	3					3					3	76.3	614.0	596.9	2.05			
	4					4					4							
	5					5					5							
	6					6					6							
	7					7					7							
8					8					8								
All					All					All	76.3	614.0	596.9	2.05	YES	YES		
Growth Measure	Comparison:				Comparison:				Comparison:									
	Grades	School	State		Grades	School	State		Grades	School	State							
	4				4					4								
	5				5					5								
	6				6					6								
	7				7					7								
	8				8					8								
	All				All					All								
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.																		NA

APPENDIX B: Performance Summaries

SCHOOL PERFORMANCE SUMMARY: MATHEMATICS

Bronx Charter School for Excellence 2

2016-17 Grades Served				2017-18 Grades Served				2018-19 Grades Served K-3							
	Grades	All		2+ Years		MET		Grades	All		2+ Years		MET		
		% (N)	% (N)	% (N)	% (N)	% (N)	% (N)								
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	(0)	(0)	(0)	(0)			3	(0)	94.9 (59)	(0)	97.8 (46)			
	4	(0)	(0)	(0)	(0)			4	(0)	(0)	(0)	(0)			
	5	(0)	(0)	(0)	(0)			5	(0)	(0)	(0)	(0)			
	6	(0)	(0)	(0)	(0)			6	(0)	(0)	(0)	(0)			
	7	(0)	(0)	(0)	(0)			7	(0)	(0)	(0)	(0)			
	8	(0)	(0)	(0)	(0)			8	(0)	(0)	(0)	(0)			
	All	(0)	(0)	(0)	(0)			All	(0)	94.9 (59)	(0)	97.8 (46)			
	Grades	PI		AMO		Grades		PI		Grades		MIP			
2. Each year the school's aggregate Performance Index on the State exam will meet the Measure of Interim Progress set forth in the State's ESSA accountability system.	Grades											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:				Comparison:				Comparison: Bronx CSD 11						
	Grades	School	District		Grades	School	District		Grades	School	District				
	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES	Grade	% ED	Actual	Predicted	ES
	3					3					3	76.3	617.0	597.0	2.21
	4					4					4				
	5					5					5				
	6					6					6				
	7					7					7				
8					8					8					
All					All					All	76.3	617.0	597.0	2.21	YES
5. Each year, the school's unadjusted mean growth percentile will meet or exceed the target of 50.	Grades	School	State		Grades	School	State		Grades	School	State				
	4				4				4						
	5				5				5						
	6				6				6						
	7				7				7						
	8				8				8						
	All				All				All						
															NA

APPENDIX C: District Comments

SUMMARY OF PUBLIC COMMENTS

The NYCDOE held its required hearing on Bronx Excellence 2’s renewal application on October 13, 2020 by videoconference. Twenty-nine people were present and no one spoke in opposition to the renewal application. The CEO of Excellence Schools spoke to the accomplishments of the school and the network of schools in New York City citing they consistently outperform at the city and state levels. The CEO also noted the flagship school’s recent Blue Ribbon Award.

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

APPENDIX D: Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE 2

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

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
-	51,946	131,892	393,109	429,263
-	330,402	468,438	709,544	1,123,051
-	132,931	184,798	307,987	385,183
-	-	-	-	-
-	515,279	785,128	1,410,640	1,937,497
-	124,044	154,345	383,428	606,894
-	-	-	-	-
-	226,252	348,519	497,333	655,103
-	313,869	313,466	313,869	313,870
-	494	326	22	3,288
-	169,745	209,128	350,314	246,097
-	7,149	854	4,659	1,131
-	148,209	161,831	143,117	125,598
-	-	7,556	9,131	11,457
-	119,451	147,575	182,626	156,235
-	1,624,492	2,128,728	3,295,139	4,057,170

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
-	120	180	240	300
-	120	180	240	300
-	118	178	238	295
-	K-1	K-2	K-3	K-4
-	-	-	-	-

Primary School District: NYC CHANCELLOR'S OFFICE

Per Pupil Funding (Weighted Avg of All Districts)

Increase over prior year

-	-	14,527	15,307	16,150
0.0%	0.0%	100.0%	5.1%	5.2%

PER STUDENT BREAKDOWN

Revenue

Operating
Other Revenue and Support
TOTAL - GRAPH 3

-	18,339	21,104	19,363	19,319
-	83	9	0	-
-	18,422	21,114	19,363	19,319

Expenses

Program Services
Management and General, Fundraising
TOTAL - GRAPH 3
% of Program Services
% of Management and Other

-	11,969	11,213	12,460	12,746
-	1,815	727	1,390	1,013
-	13,785	11,940	13,850	13,759
0.0%	86.8%	93.9%	90.0%	92.6%
0.0%	13.2%	6.1%	10.0%	7.4%
0.0%	33.6%	76.8%	39.8%	40.4%

% of Revenue Exceeding Expenses - GRAPH 5

Student to Faculty Ratio

0.0	14.7	22.3	29.7	15.5
-----	------	------	------	------

Faculty to Admin Ratio

-	4.0	4.0	4.0	6.3
---	-----	-----	-----	-----

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 ≥ 3.0 / Medium 1.4 - 2.9 / High < 1.4)
Rating (Excellent ≥ 3.0 / Good 1.4 - 2.9 / Poor < 1.4)

0	0	0	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 ≥ 2.5 / Medium 1.0 - 2.4 / High < 1.0)
Rating (Excellent ≥ 2.5 / Good 1.0 - 2.4 / Poor < 1.0)

0.0	0.0	0.0	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

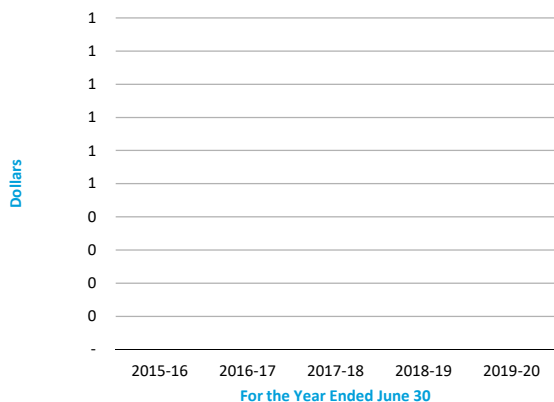
APPENDIX D: Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE 2

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

GRAPH 1

Cash, Assets and Liabilities

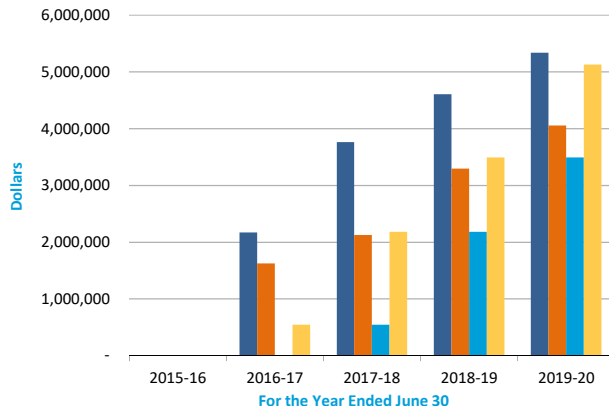


■ Cash ■ Current Assets ■ Current Liabilities ■ Total Assets ■ Total Liabilities

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

GRAPH 2

Revenue, Expenses and Net Assets

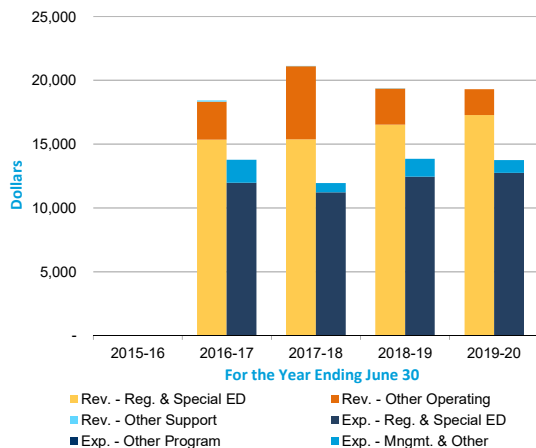


■ Revenue ■ Expenses ■ Net Assets - Beginning ■ Net Assets - Ending

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

GRAPH 3

Revenue & Expenses Per Pupil

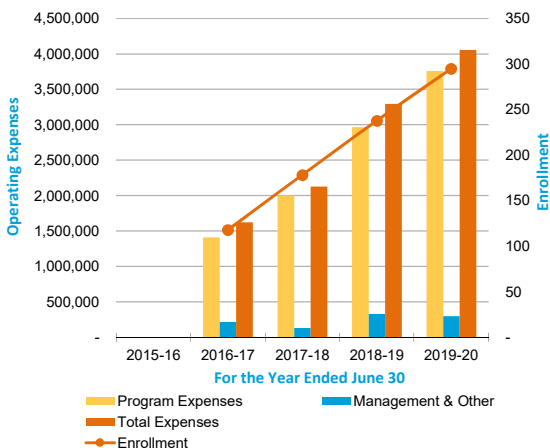


■ Rev. - Reg. & Special ED ■ Rev. - Other Support ■ Rev. - Other Operating ■ Exp. - Reg. & Special ED ■ Exp. - Other Program ■ Exp. - Mngmt. & Other

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 D: Fiscal Dashboard

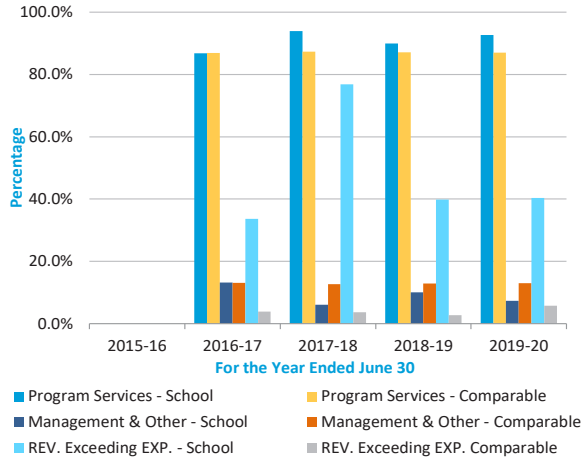
BRONX CHARTER SCHOOL FOR EXCELLENCE 2

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

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

GRAPH 5

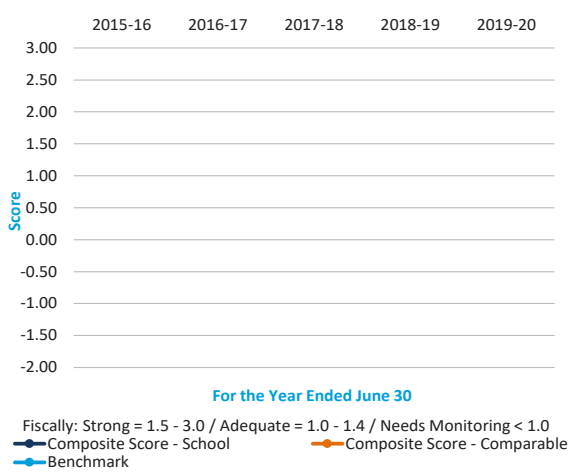
% Breakdown of Expenses



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

GRAPH 6

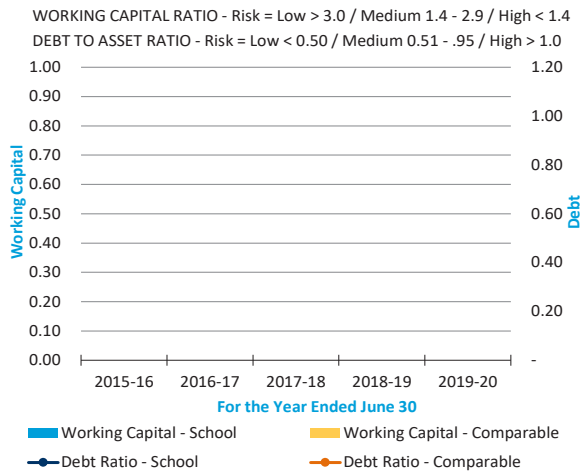
Composite Score



This chart illustrates a school's composite score based on the methodology developed by the United States Department of Education (USD OE) 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

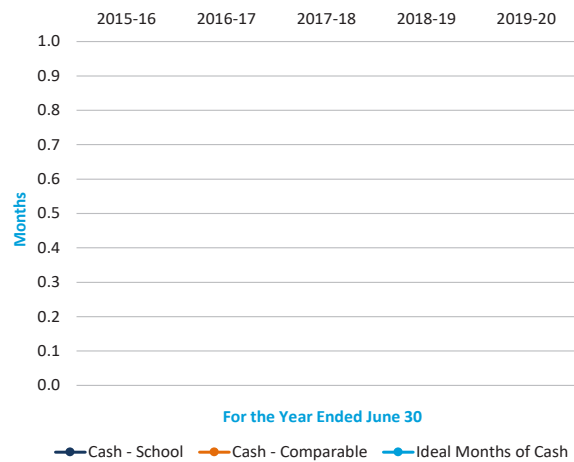
Working Capital & Debt to Asset Ratios



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

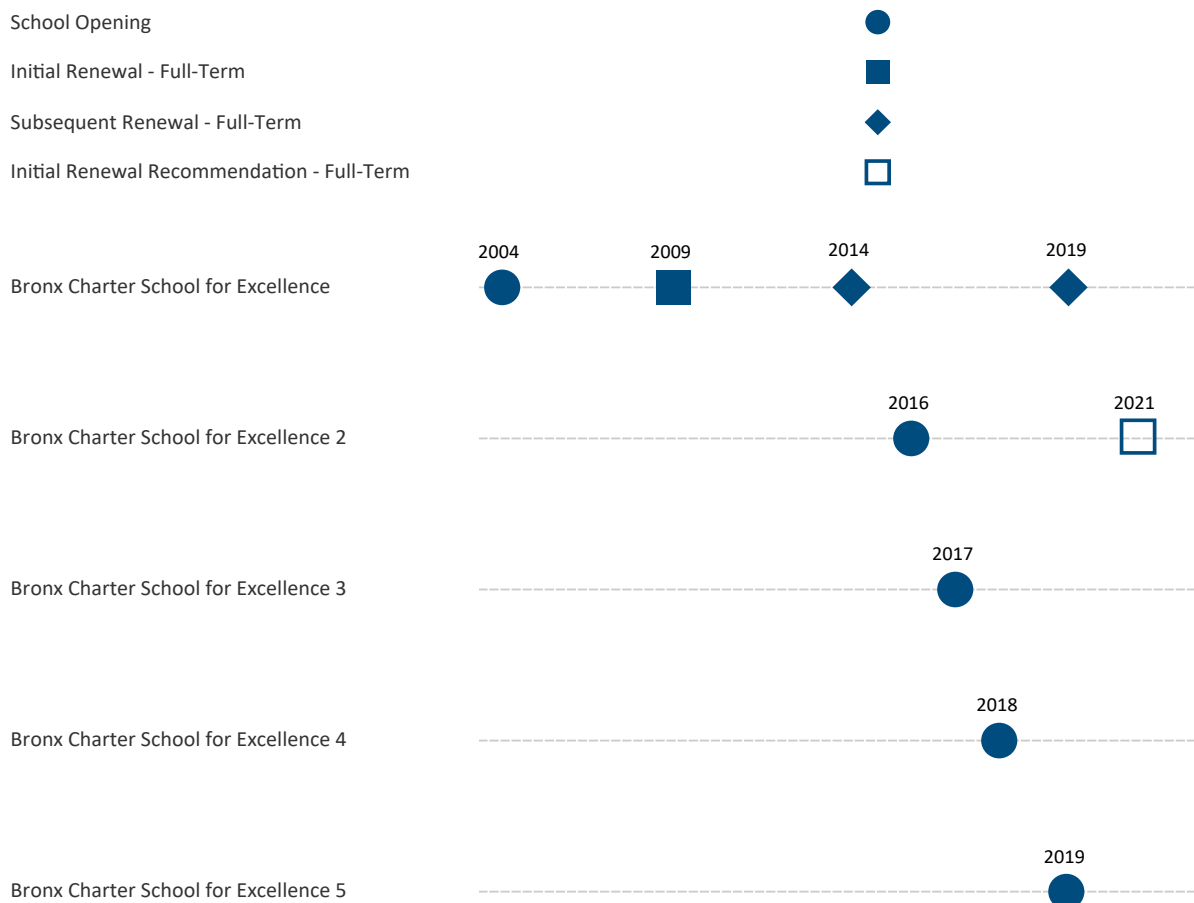
Months of Cash



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.

APPENDIX E: Education Corporation Overview

EDUCATION CORPORATION TIMELINE OF CHARTER RENEWAL



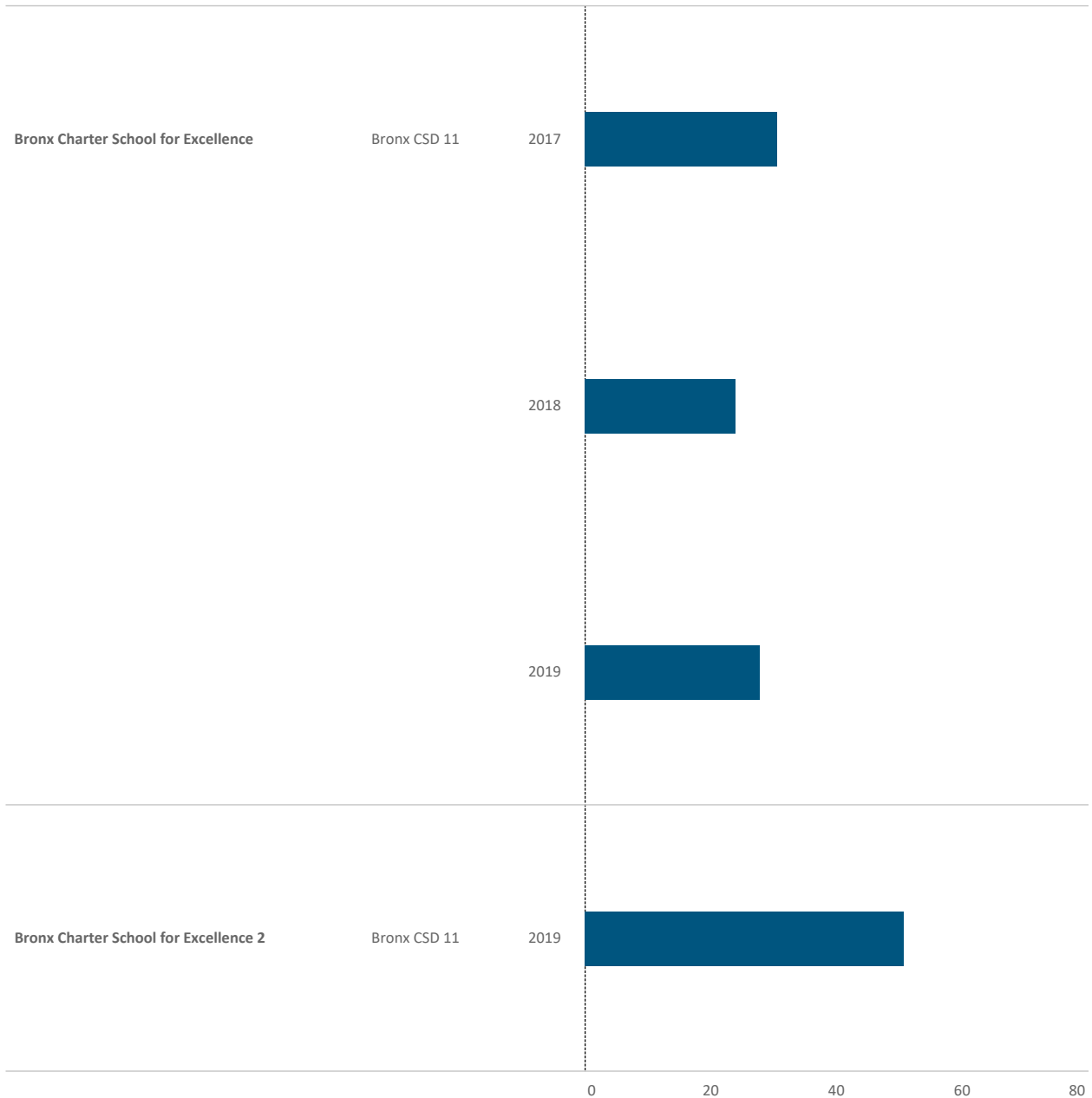
APPENDIX E: Education Corporation Overview

EDUCATION CORPORATION SCHOOL CHARACTERISTICS

SCHOOL	LOCAL DISTRICT	CO-LOCATED	CHARTERED ENROLLMENT	GRADE SPAN
Bronx Charter School for Excellence	Bronx CSD 11	No	810	K-8
Bronx Charter School for Excellence 2	Bronx CSD 11	No	360	K-5
Bronx Charter School for Excellence 3	Bronx CSD 11	No	450	K-4
Bronx Charter School for Excellence 4	Bronx CSD 11	No	360	K-3
Bronx Charter School for Excellence 5	Bronx CSD 10	No	180	K-2

APPENDIX E: Education Corporation Overview

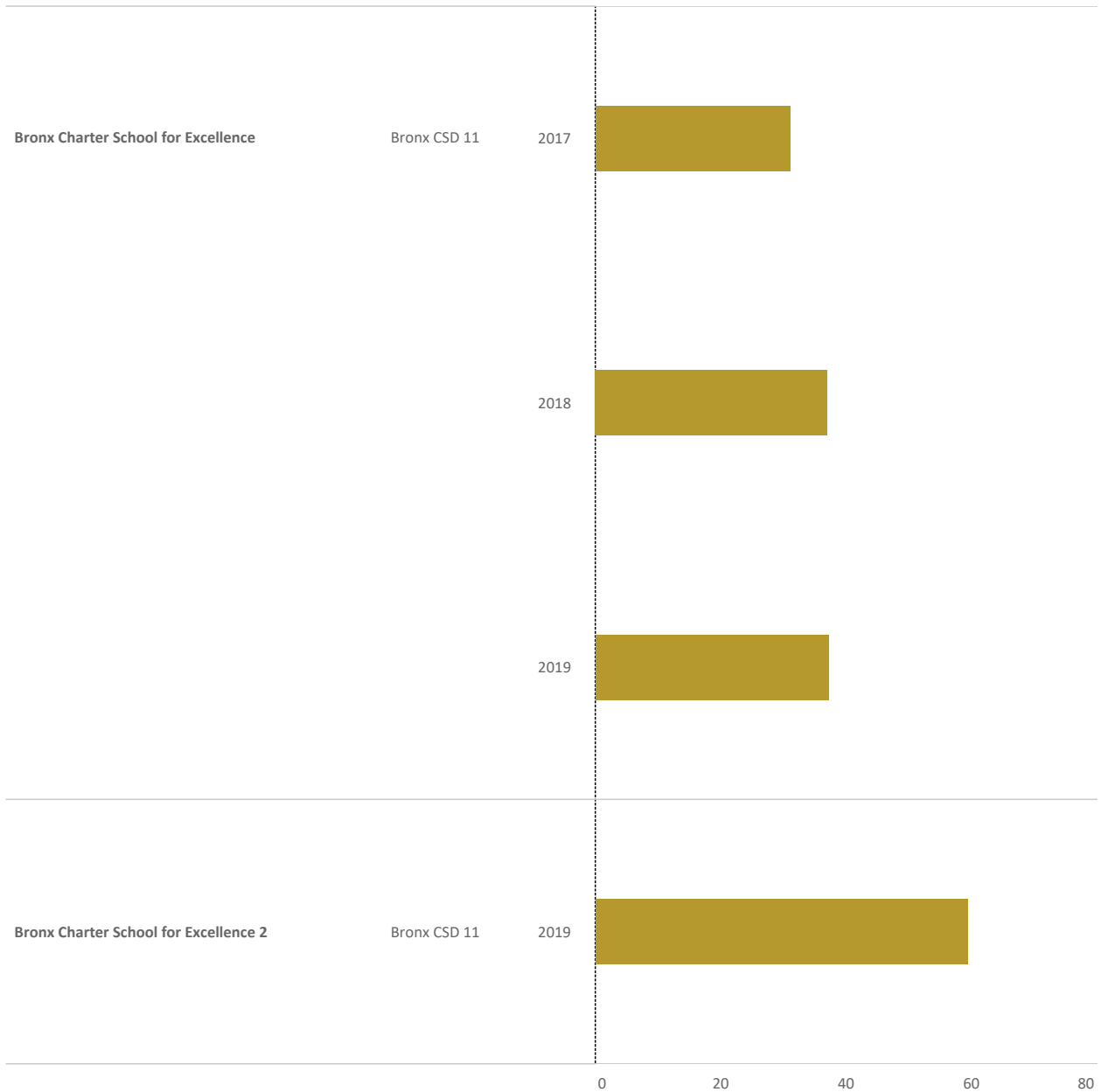
DIFFERENCE BETWEEN SCHOOLS AND DISTRICT SCORES: ELA



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.

APPENDIX E: Education Corporation Overview

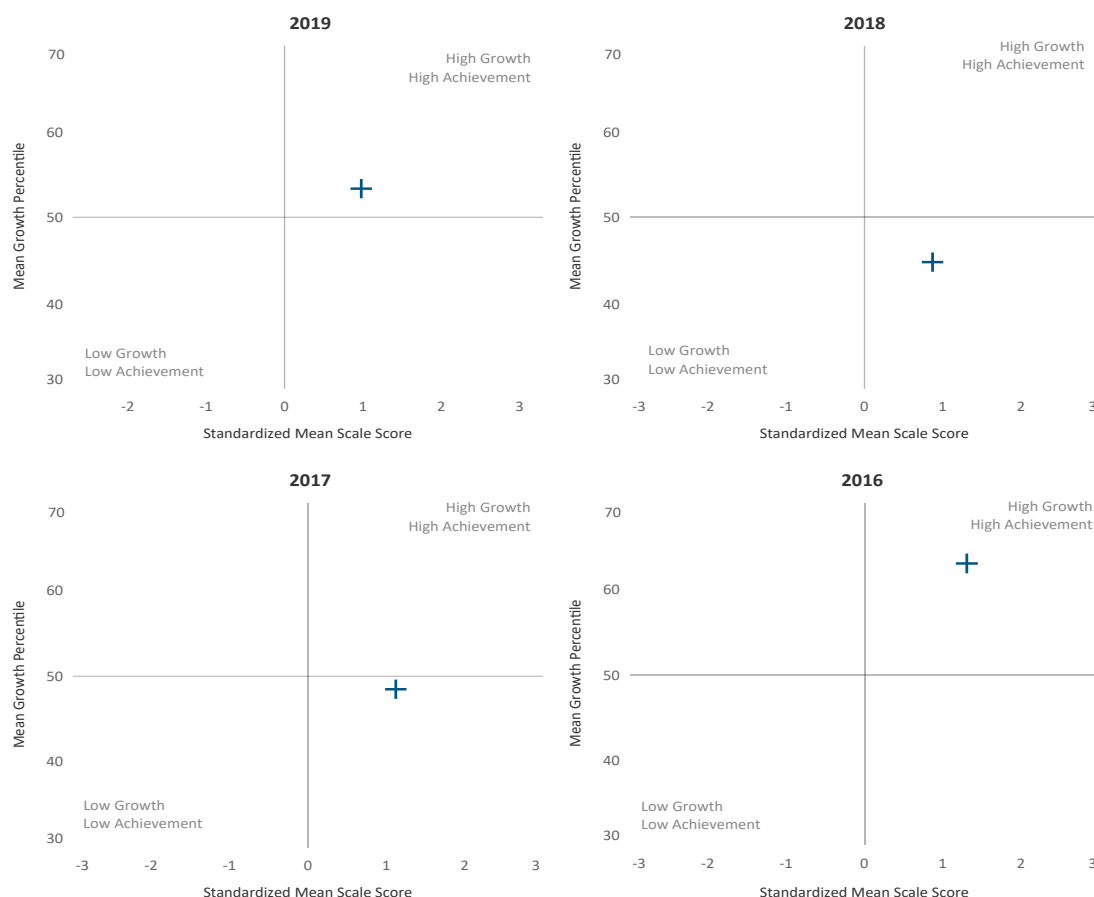
DIFFERENCE BETWEEN SCHOOLS AND DISTRICT SCORES: MATH



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.

APPENDIX E: Education Corporation Overview

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

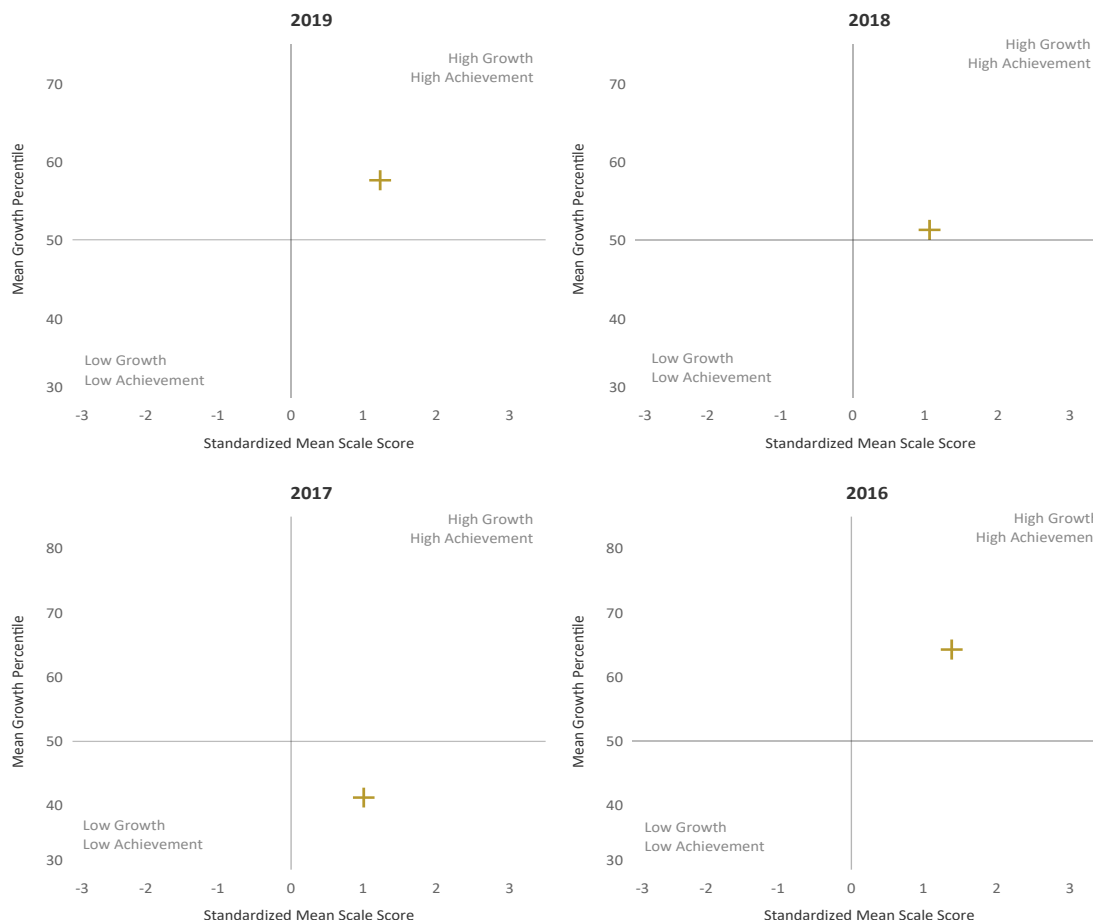


These charts compare a school's ability to grow student achievement with a school's absolute student performance. Schools located in the upper right hand quadrant of each chart show strong results in helping students make learning gains while at the same time helping students achieve strong absolute 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.

APPENDIX E: Education Corporation Overview

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

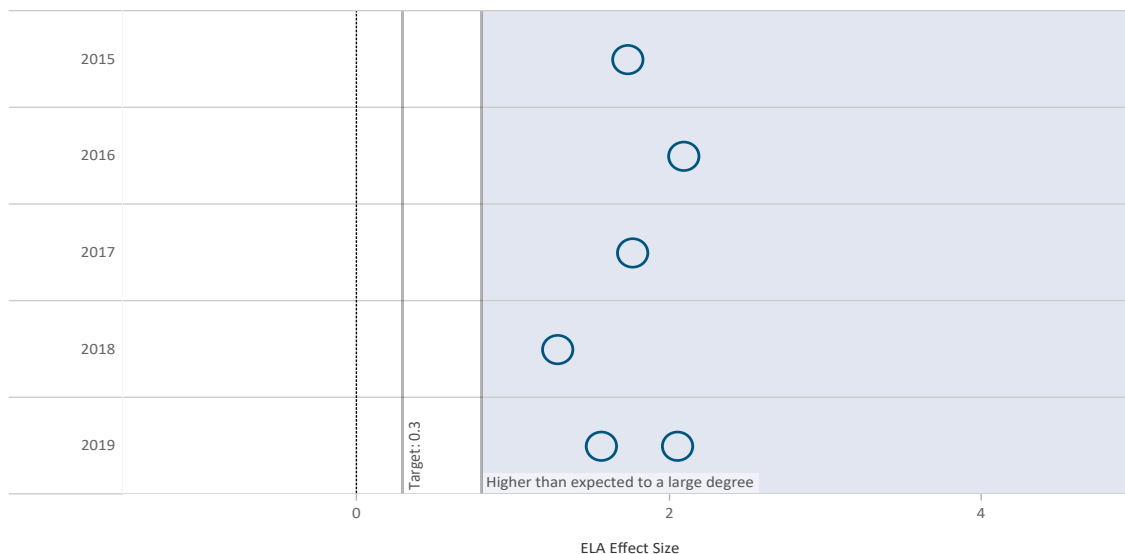


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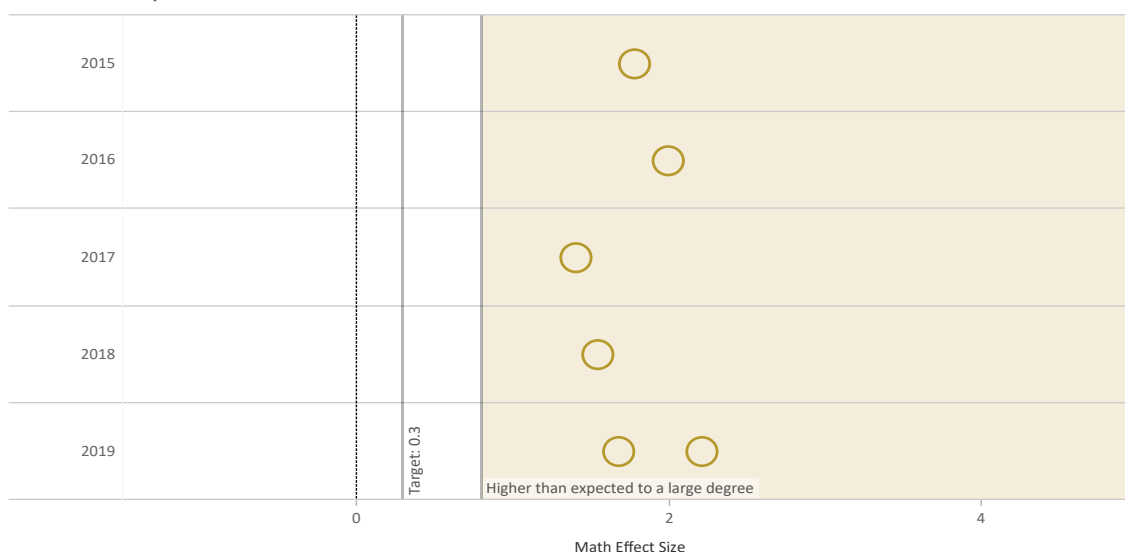
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APPENDIX E: Education Corporation Overview

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



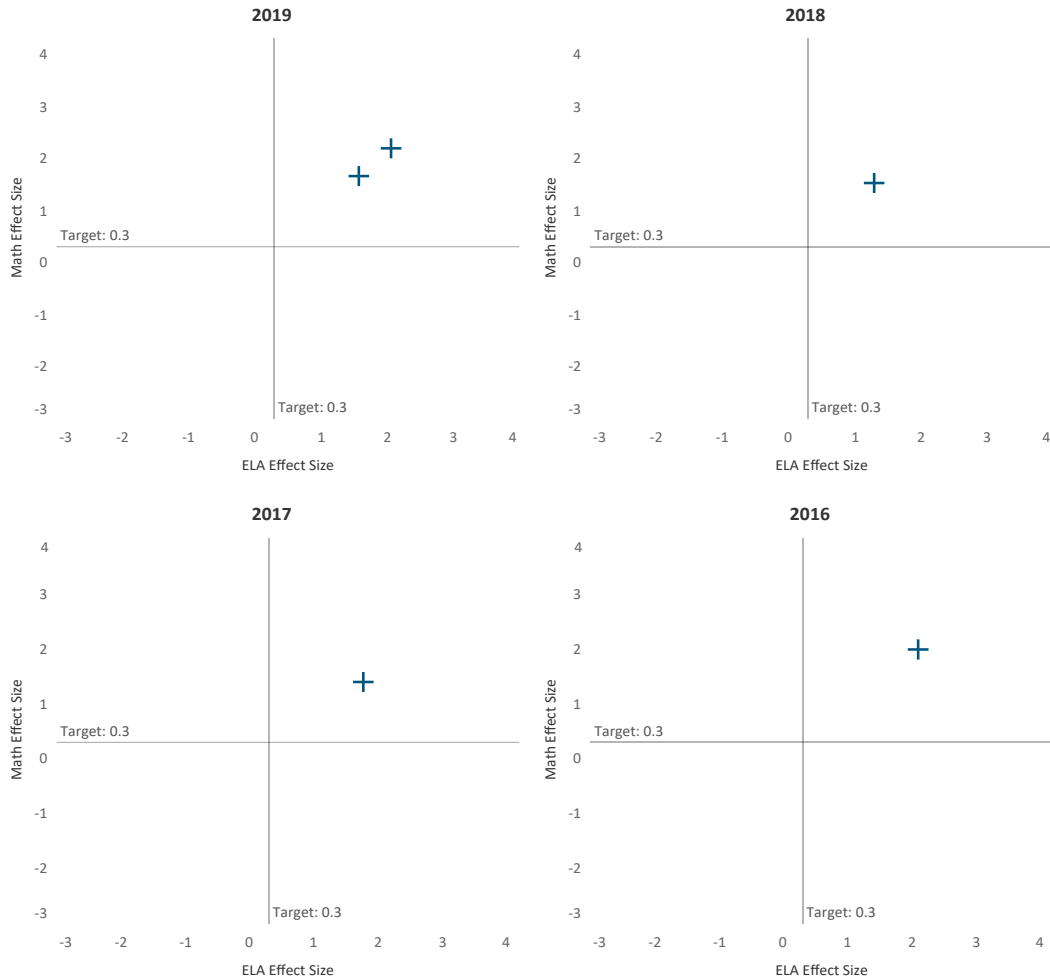
Math Effect Size by Year and School



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.

APPENDIX E: Education Corporation Overview

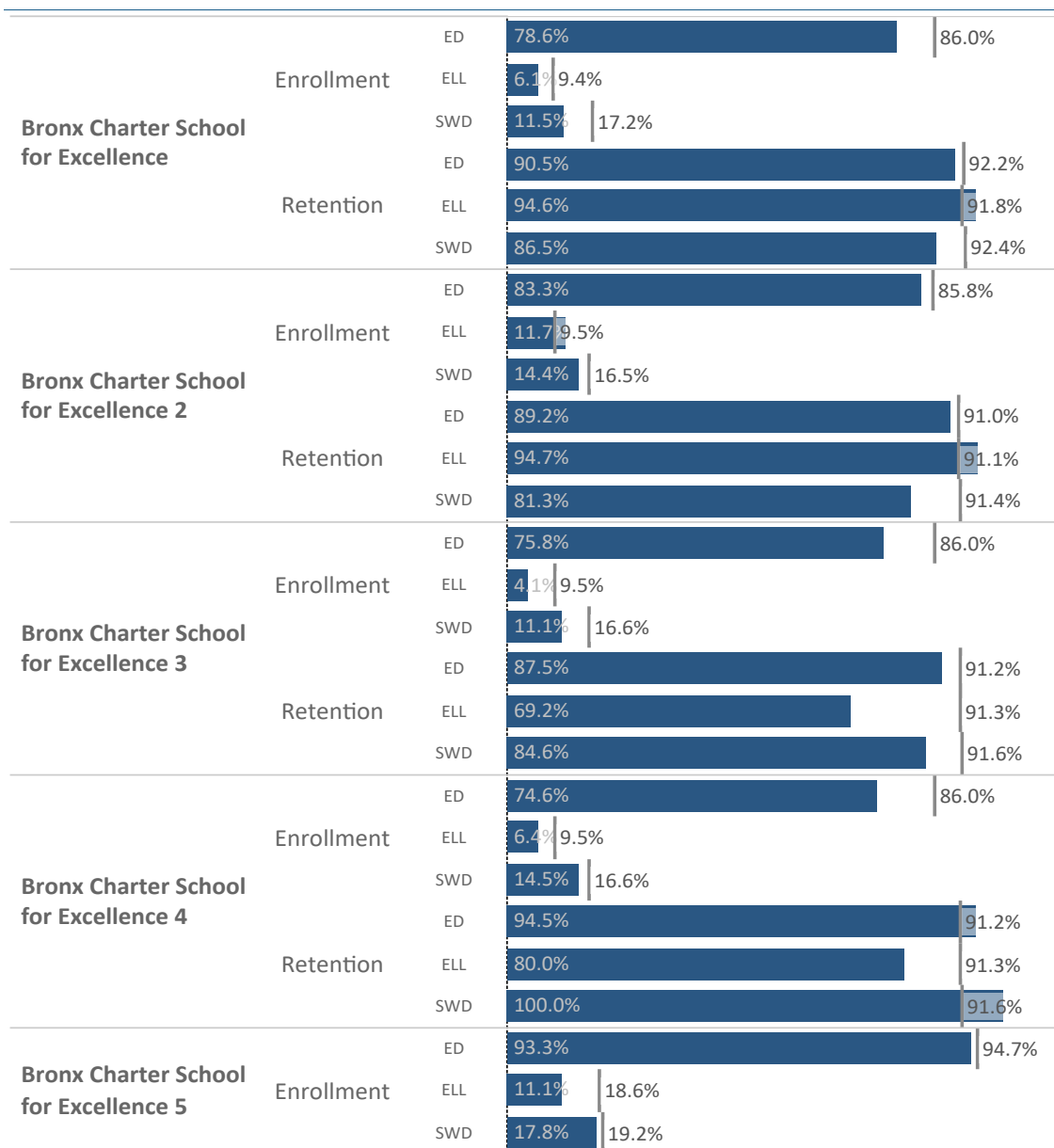
ELA AND MATH EFFECT SIZE SCATTER PLOTS 2015-16 THROUGH 2018-19



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.

APPENDIX E: Education Corporation Overview

ENROLLMENT AND RETENTION TARGETS



The chart illustrates the **current enrollment and retention percentages** against the **enrollment and retention targets** for each operating school in the education corporation. As required by Education Law § 2851(4)(e), a school must include in its renewal application information regarding the efforts it has, and will, put in place to meet or exceed SUNY's enrollment and retention targets for students with disabilities, ELLs, and FRPL students. This analysis is based on the 2018-19 enrollment and retention data supplied to the Institute by the network.

APPENDIX E: Education Corporation Overview

Suspensions: Bronx Charter School for Excellence's out of school suspension rate and in school suspension rate.



Although Community School District ("CSD") and school suspension rates are presented on the same graph, a direct comparison between the rates is not possible because available CSD data includes Kindergarten through 12th grades and school data includes only the grades served by the school. The percentage rate shown here is calculated using the method employed by the New York City Department of Education: the total the number of students receiving an out of school suspension at any time during the school year is divided by the total enrollment, then multiplied by 100.

During the school years ending in 2018, 2019, and 2020 Bronx Excellence Schools schools expelled 0 students.

APPENDIX E: Education Corporation Overview

PERSISTENCE IN ENROLLMENT



APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

SCHOOL INFORMATION

BALANCE SHEET

Assets

Current Assets

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

Total Current Assets - GRAPH 1

Property, Building and Equipment, net
Other Assets

Total Assets - GRAPH 1

Liabilities and Net Assets

Current Liabilities

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

Total Current Liabilities - GRAPH 1

Deferred Rent/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

	COMBINED	COMBINED	COMBINED	COMBINED
2015-16	2016-17	2017-18	2018-19	2019-20
-	4,058,737	6,312,887	12,314,675	17,322,873
-	537,248	1,425,882	943,191	762,754
-	-	-	-	-
-	74,434	207,048	250,099	413,517
-	452,070	282,337	298,803	887,116
-	5,122,489	8,228,154	13,806,768	19,386,260
-	33,122,435	32,845,287	32,041,208	31,550,369
-	2,681,705	3,141,176	3,263,292	3,196,069
-	40,926,629	44,214,617	49,111,268	54,132,698

Accounts Payable and Accrued Expenses	-	755,560	974,445	893,023	470,872
Accrued Payroll and Benefits	-	487,364	782,444	1,094,985	2,131,125
Deferred Revenue	-	4,061	39,753	258,391	49,782
Current Maturities of Long-Term Debt	-	470,000	485,000	-	-
Short Term Debt - Bonds, Notes Payable	-	-	-	505,000	525,000
Other	-	1,841,071	569,995	731,852	318,720
Total Current Liabilities - GRAPH 1	-	3,558,056	2,851,637	3,483,251	3,495,499
Deferred Rent/Lease Liability	-	-	552,578	697,217	1,018,372
All other L-T debt and notes payable, net current maturities	-	25,191,170	24,567,596	24,055,958	23,521,481
Total Liabilities - GRAPH 1	-	28,749,226	27,971,811	28,236,426	28,035,352

Without Donor Restrictions	-	12,177,403	16,242,806	20,649,842	25,872,346
With Donor Restrictions	-	-	-	225,000	225,000
Total Net Assets	-	12,177,403	16,242,806	20,874,842	26,097,346
Total Liabilities and Net Assets	-	40,926,629	44,214,617	49,111,268	54,132,698

Resident Student Enrollment	-	13,373,465	16,796,018	21,809,994	27,315,182
Students with Disabilities	-	1,013,401	838,744	1,114,456	1,377,588

State and local	-	262,412	327,787	257,100	138,051
Federal - Title and IDEA	-	468,772	720,124	1,129,719	1,127,911
Federal - Other	-	159,571	573,129	348,050	382,948
Other	-	-	-	-	-
NYC DoE Rental Assistance	-	-	1,150,953	1,345,517	1,821,587
Food Service/Child Nutrition Program	-	-	473,517	467,487	266,461
Total Operating Revenue	-	15,277,621	20,880,272	26,472,323	32,429,728

Regular Education	-	8,366,370	13,806,892	17,511,569	21,308,912
SPED	-	1,366,235	2,079,189	2,728,494	4,233,336
Other	-	-	-	-	-
Total Program Services	-	9,732,605	15,886,081	20,240,063	25,542,248
Management and General	-	1,368,518	994,369	1,615,421	1,813,864
Fundraising	-	24,066	436	25,120	580
Total Expenses - GRAPHS 2, 3 & 4	-	11,125,189	16,880,886	21,880,604	27,356,692
Surplus / (Deficit) From School Operations	-	4,152,432	3,999,386	4,591,719	5,073,036

Contributions	-	120,767	11,505	-	43,073
Fundraising	-	41,889	30,250	-	-
Miscellaneous Income	-	105,862	24,262	40,317	106,395
Net assets released from restriction	-	-	-	-	-
Total Support and Other Revenue	-	268,518	66,017	40,317	149,468

Total Unrestricted Revenue	-	15,546,139	20,946,289	26,512,640	30,757,609
Total Temporally Restricted Revenue	-	-	-	-	-
Total Revenue - GRAPHS 2 & 3	-	15,546,139	20,946,289	26,512,640	30,757,609

Change in Net Assets	-	4,420,950	4,065,403	4,632,036	5,222,504
Net Assets - Beginning of Year - GRAPH 2	-	7,756,453	12,177,403	16,242,806	20,874,842
Prior Year Adjustment(s)	-	-	-	-	-
Net Assets - End of Year - GRAPH 2	-	12,177,403	16,242,806	20,874,842	26,097,346

APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

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

2015-16	2016-17	2017-18	2018-19	2019-20
-	241,094	621,709	1,297,673	1,880,446
-	2,501,875	3,747,075	5,053,544	7,087,052
-	675,178	1,083,247	2,334,321	2,778,171
-	-	-	-	-
-	3,418,147	5,452,031	8,685,538	11,745,669
-	960,456	1,443,344	2,183,799	3,291,389
-	-	-	-	-
-	1,834,483	2,244,243	2,897,481	3,698,128
-	316,254	1,391,727	1,404,428	2,635,435
-	26,993	14,100	47,443	63,443
-	1,306,933	1,554,792	1,824,071	1,280,046
-	9,536	22,519	37,154	24,000
-	553,687	619,162	824,083	865,134
-	862,947	1,015,524	1,117,445	1,190,046
-	1,835,752	3,123,444	2,859,162	2,563,402
-	11,125,188	16,880,886	21,880,604	27,356,692

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
-	848	1,056	1,296	1,770
-	848	1,086	1,356	1,770
-	926	1,131	1,383	1,671
-	-	-	-	-
-	-	-	-	-

Primary School District:

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

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

PER STUDENT BREAKDOWN

Revenue

Operating
Other Revenue and Support
TOTAL - GRAPH 3

-	16,504	18,469	19,136	19,409
-	290	58	29	89
-	16,794	18,528	19,165	19,498

Expenses

Program Services
Management and General, Fundraising
TOTAL - GRAPH 3
% of Program Services
% of Management and Other

-	10,514	14,052	14,631	15,287
-	1,504	880	1,186	1,086
-	12,019	14,932	15,817	16,372
0.0%	87.5%	94.1%	92.5%	93.4%
0.0%	12.5%	5.9%	7.5%	6.6%
0.0%	39.7%	24.1%	21.2%	19.1%

% of Revenue Exceeding Expenses - GRAPH 5

Student to Faculty Ratio

0.0	21.5	19.8	22.0	14.2
-----	------	------	------	------

Faculty to Admin Ratio

-	3.9	4.4	4.5	4.7
---	-----	-----	-----	-----

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	2.5	2.7	2.8	3.0
N/A	Fiscally Strong	Fiscally Strong	Fiscally Strong	Fiscally Strong

Working Capital - GRAPH 7

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

0	1,564,433	5,376,517	10,323,517	15,890,761
0.0%	10.1%	25.7%	38.9%	51.7%
0.0	1.4	2.9	4.0	5.5
N/A	MEDIUM	MEDIUM	LOW	LOW
N/A	Good	Good	Excellent	Excellent

Quick (Acid Test) Ratio

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

0.0	1.4	2.8	3.9	5.4
N/A	MEDIUM	LOW	LOW	LOW
N/A	Good	Excellent	Excellent	Excellent

Debt to Asset Ratio - GRAPH 7

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

0.0	0.7	0.6	0.6	0.5
N/A	MEDIUM	MEDIUM	MEDIUM	MEDIUM
N/A	Good	Good	Good	Good

Months of Cash - GRAPH 8

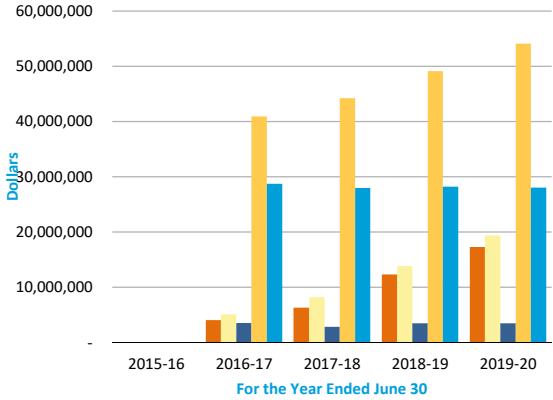
Score
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)

0.0	4.4	4.5	6.8	7.6
N/A	LOW	LOW	LOW	LOW
N/A	Excellent	Excellent	Excellent	Excellent

APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

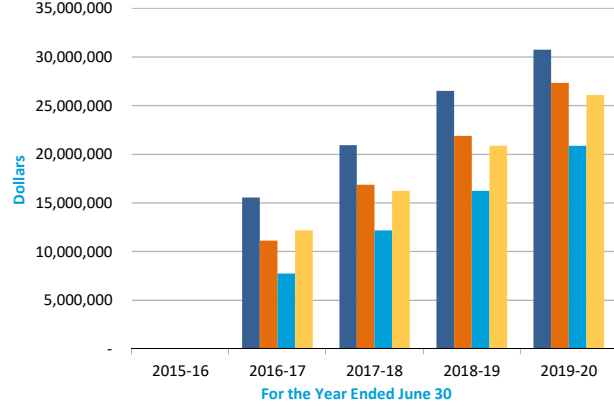
GRAPH 1 Cash, Assets and Liabilities



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

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

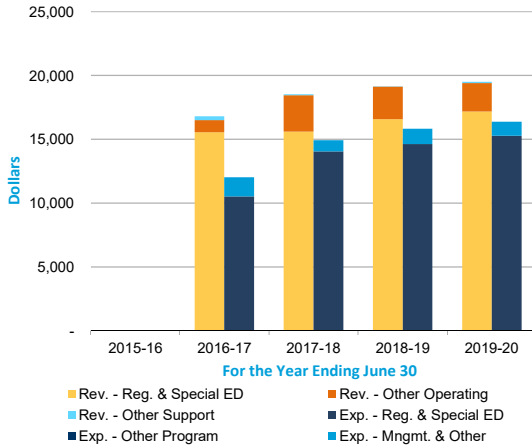
GRAPH 2 Revenue, Expenses and Net Assets



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

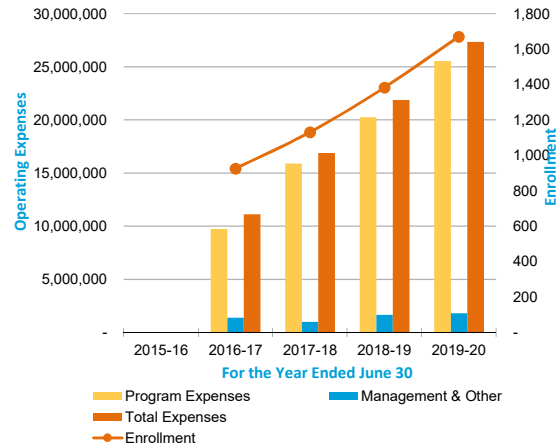
This chart illustrates total revenue and expenses each year and the relationship those subsets have on the increase/decrease of net assets on a year-to-year basis. Ideally subset 1, revenue, will be taller than subset 2, expenses, and as a result subset 3, net assets - beginning, will increase each year,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

GRAPH 3 Revenue & Expenses Per Pupil



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



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.

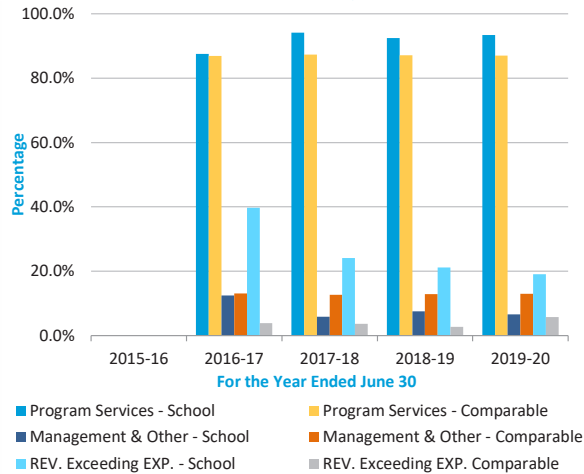
APPENDIX F: Ed Corp Fiscal Dashboard

BRONX CHARTER SCHOOL FOR EXCELLENCE (COMBINED)

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

GRAPH 5

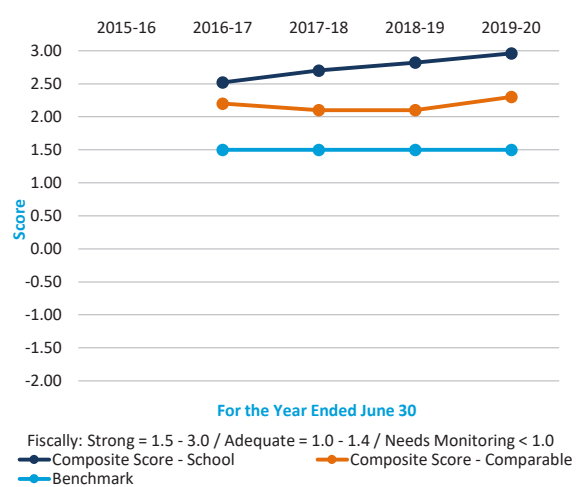
% Breakdown of Expenses



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

GRAPH 6

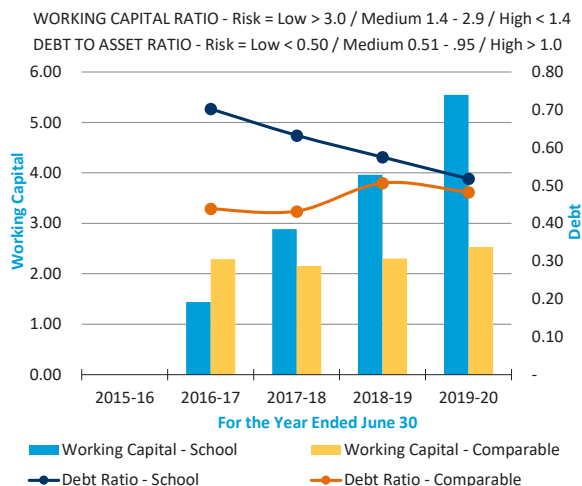
Composite Score



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

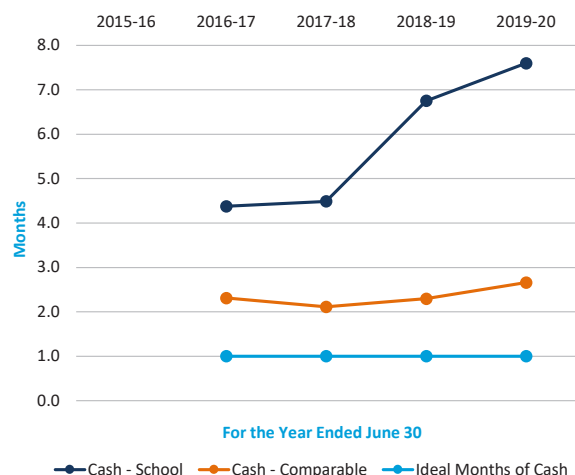
Working Capital & Debt to Asset Ratios



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

Months of Cash



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.

