



Renewal Recommendation Report Success Academy Charter School - Harlem 5

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INTRODUCTION

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”) (revised September 4, 2013 and available at:

<http://www.newyorkcharters.org/wp-content/uploads/SUNY-Renewal-Policies.pdf>).

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: <http://www.newyorkcharters.org/operate/existing-schools/renewal/>.

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

SUCCESS ACADEMY CHARTER SCHOOL—HARLEM 5

BACKGROUND

Opened in September 2010, Success Academy Charter School-Harlem 5 (“Success Harlem 5”) is now in its fifth year of its initial charter term. An analysis of the school’s success in meeting the academic goals in its charter combined with the qualitative data gathered by the Institute over the course of this charter term indicate Success Harlem 5 provides a high quality educational option to the families of Harlem. The school opened as an independent not-for-profit education corporation replicating the high performing program first implemented at Success Academy Charter School–Harlem 1 (“Success Harlem 1”). Success Harlem 1 opened as a school authorized by the New York State Board of Regents (the “Board of Regents”), and later merged into the SUNY authorized charter school education corporation that became Success Academy Charter Schools–NYC (“SACS-NYC” or the “education corporation”).

The mission of Success Academy Charter School-Harlem 5 is to provide students in New York City with an exceptionally high-quality education that gives them the knowledge, skills, character and disposition to meet and exceed NY State Common Core Learning Standards, and the resources to lead and succeed in school, college and a competitive global economy.

Success Harlem 5 seeks to provide this exceptionally high-quality education to all of their students, including English language learners and students with special education needs, irrespective of socioeconomic, racial, ethnic and/or other status.

Effective October 1, 2012, Success Harlem 5 merged into SACS-NYC. The merged education corporation now has authority to oversee the operations and finances of 24 currently operating schools and plans to open an additional 14 schools in the next several years. All schools operated by the education corporation including Success Harlem 5 contract with Success Academy Charter Schools, Inc., (“Success” or the “network”), a Delaware not-for-profit charter management organization based in New York City, for comprehensive management services.

The school currently serves 510 students in grades K-3 in a co-located facility at 301 West 140th Street, and grades 4-5 in a co-located facility at 175 West 134th Street, both in Manhattan in New York City Community School District (“CSD”) 5. The New York City Department of Education’s (NYCDOE’s) P.S. 175 Henry H. Garnet (pre-K – 5th grade) shares the 134th Street building and P.S. 123 Mahalia Jackson (pre-K – 8th grade) shares the 140th Street location.

SCHOOL BACKGROUND AND EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

In this, Success Harlem 5's initial charter term, the school met its academic Accountability Plan goals and the Institute recommends a Full-Term renewal as it finds Success Harlem 5 to be an effective, viable and fiscally sound organization.

The school's high academic achievement as measured by state assessments as well as the quality of student discourse and work product analyzed by the Institute as a component of the school's renewal review indicate it is likely to continue to improve student learning and achievement in the future. Success Harlem 5 benefits from strong instructional leadership, a quality instructional staff and the consistent leadership of its education corporation board of trustees (the "board"). The board, in addition to the Success network, provides effective guidance in helping the school meet its academic goals. Success Harlem 5 has generally and substantially complied with required reporting over the charter term. Fiscally the school is sound posting operating surpluses without fundraising contributions in all but its first year of operation.

NOTEWORTHY

Starting in Kindergarten, all students at Success Harlem 5 participate in interactive science instruction five days per week. A full time science teacher facilitates daily lab activities that give students the opportunity to explore and develop their inquiry skills while building upon a rich base of vocabulary. In 2014, 100% of 4th grade students scored a level four on the New York State Science exam, clearly indicating that they performed above grade level expectations.

RENEWAL RECOMMENDATION

RECOMMENDATION: FULL-TERM RENEWAL

The Institute recommends that the SUNY Trustees approve the Application for Charter Renewal of Success Academy Charter School–Harlem 5 and renew Success Academy Charter Schools–NYC’s authority to operate the school for a period of five years with authority to provide instruction to students in Kindergarten through 10th grade in such configuration as set forth in its Application for Charter Renewal, with a projected total enrollment of 880 students.

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

- (a) 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,¹ is generally effective; or
- (b) have made progress toward 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, is particularly strong and effective.²

¹ The Qualitative Education Benchmarks are a subset of the *State University of New York Charter Renewal Benchmarks* (version 5.0, the “SUNY Renewal Benchmarks”), available at:

<http://www.newyorkcharters.org/wp-content/uploads/SUNY-Renewal-Benchmarks.pdf>.

² SUNY Renewal Policies at p. 12.

RENEWAL RECOMMENDATION

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:

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

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, English language learners ("ELLs"), and students who are eligible applicants for the federal Free and Reduced Price Lunch ("FRPL") program. SUNY⁴ and the Board of Regents finalized the methodology for setting targets in October 2012, and the Institute communicated specific targets or proposed targets for each school in July 2013.

Given the date the school was originally chartered, it does not have statutory targets. However, in accordance with the Act, the Institute, acting on behalf of the SUNY Trustees, considered the school's plans for meeting its future enrollment and retention targets during the next charter term prior to recommending the renewal application for approval. The Institute found the plans to meet or exceed the targets, and the plans to educate students with disabilities, ELLs and FRPL students, satisfactory. The Institute also found the school to be making good faith efforts to attract and retain such students in accordance with the Act.

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. As of the date of this report, the Institute has received no district comments in response.

³ See New York Education Law § 2852(2).

⁴ SUNY Trustees' Charter Schools Committee resolution dated October 2, 2012.

RENEWAL RECOMMENDATION

REPORT FORMAT

The Institute makes the foregoing renewal recommendation based on the school's Application for Charter Renewal, evaluation visits conducted and information gathered during the charter term and a renewal evaluation visit conducted near the end of the current charter term. Additionally, the Institute has reviewed the strength and fiscal health of the not for profit education corporation with the authority to operate the school. 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. This renewal recommendation report compiles the evidence below using the SUNY Renewal Benchmarks, 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 an education corporation has made an adequate case for renewal of a school.

1. Is the school an academic success?
2. Is the school an effective, viable organization?
3. Is the education corporation operating the school fiscally sound?
4. If the SUNY Trustees renew the education corporation's authority to operate the school, what are the education corporation's plans for the school for the next term of authority to operate the school, and are they reasonable, feasible and achievable?

The report's Appendix provides a School Overview, copies of any school district comments on the Application for Charter Renewal, the SUNY Fiscal Dashboard information for the school, and, if applicable, its education corporation and additional evidence on student achievement contained in the School Performance Summaries.

RENEWAL BENCHMARK CONCLUSIONS

IS THE SCHOOL AN ACADEMIC SUCCESS?

Success Harlem 5 is an academic success. Over the charter term or Accountability Period,⁵ Success Harlem 5 has met and exceeded its key Accountability Plan goals. Based on evidence the Institute compiled throughout the charter term and at the time of renewal, the school's academic program is strong, effective and supported by quality instructional and organizational leadership.

At the beginning of the Accountability Period, the school developed and adopted an Accountability Plan that set academic goals in the key subjects of English Language Arts ("ELA") and mathematics. The Institute examines results for five required Accountability Plan measures to determine ELA and math goal attainment. Because the Act requires charters be held "accountable for meeting measurable student achievement results"⁶ and states the educational programs at a charter school must "meet or exceed the student performance standards adopted by the board of regents"⁷ for other public schools, SUNY's required accountability measures rest on performance as measured by state wide 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?; and,
- growth performance, i.e., how well did the school do in catching students up – and then keeping them up to grade level proficiency?

Every SUNY authorized charter school has the opportunity to propose additional measures of success when crafting its Accountability Plan. Success Harlem 5 did not propose or include any additional measures of success in the Accountability Plan it adopted.

Because of testing changes made by the state, the Institute has since 2009 consistently de-emphasized the two absolute measures under each goal in schools' Accountability Plans. The Institute continues to focus primarily on the two comparative measures and the growth measure while also considering any additional evidence the school presents using additional measures identified in its Accountability Plan. Institute identifies the required measures (absolute proficiency, absolute Annual Measurable Objective attainment,⁸ comparison to local district, comparison to demographically similar schools, and student growth) in the Performance

⁵ Because the SUNY Trustees make a renewal decision before student achievement results for the final year of a charter term become available, the Accountability Period ends with the school year prior to the final year of the charter term. For a school in an initial charter term, the Accountability Period covers the first four years the school provides instruction to students.

⁶ Education Law § 2850(2)(f).

⁷ Education Law § 2854(1)(d).

⁸ While the New York State Education Department ("NYSED") has recalibrated the absolute Annual Measurable Objective, the Institute reports only on the 2013-14 results, not on those for 2012-13.

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Summaries appearing in the Appendix at the end of the report.

The Accountability Plan also includes science and No Child Left Behind Act (“NCLB”) goals. For each goal in the Accountability Plan, specific outcome measures define the level of performance necessary to meet that goal. Please note that for schools located in New York City, the Institute uses the CSD as the local school district.

Academic Attainment. Success Harlem 5 met its key academic Accountability Plan goals in ELA and mathematics during this, its initial term of authority to operate. During 2012-13 and 2013-14, the two years for which data are available, the school’s ELA and mathematics performance is among the strongest in New York State. In both years, Success Harlem 5 outperformed 96% of the schools across New York State.

The Institute analyzes key comparative and growth measures under the school’s ELA and mathematics goals to determine goal attainment. The Institute calculates a comparative effect size to measure the performance of Success Harlem 5 relative to all public schools statewide that serve the same grade levels and that enroll students who are similarly economically disadvantaged. It is important to note that this measure is a comparison measure and therefore not dependent on any changes in New York’s assessment system. As such, the measure, and the school’s performance on the measure, is not relative to the test, but relative to how strong Success Harlem 5 performs in improving student learning compared to other schools’ performance in improving student learning.

The growth measure provides an opportunity to see how Success Harlem 5 performs in catching students up to performing academically at grade level or at or above “proficiency.” It also provides a look at how well a school does at keeping students proficient, or on grade level, every year. For a student who is proficient, keeping up to grade level means the student should make one year’s progress in one year’s time. For a student below grade level, in order to reach proficiency, the school must help the student grow *more* than one grade level every year in order to catch up.

The Institute uses the state’s mean growth percentiles as a measure of a school’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 last year’s 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 catching students who were previously below grade level up to grade level proficiency, the school must post a percentile performance that exceeds 50. A percentile performance below 50 indicates that students are losing ground, not catching up or keeping up with grade level proficiencies.

Success Harlem 5 exceeded the district’s ELA performance by at least 50 percentage points during both 2012-13 and 2013-14. Further, the school outperformed 96 percent of schools throughout



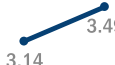



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New York State in ELA during both 2012-13 and 2013-14. Also during 2012-13 and 2013-14, Success Harlem 5 posted comparative effect sizes in ELA that exceed 99 percent of schools throughout New York State. Even with high baseline scores during 2012-13, Success Harlem 5's ELA growth scores exceeded the state median by 3 percentile points in 2013-14.

The school's math performance also ranks among the highest in New York State. With 96 percent of its students proficient in mathematics during 2013-14, the school outperformed the local district by 79 percentage points. Throughout New York State, only 11 schools performed higher than Success Harlem 5 in mathematics, placing the school's mathematics performance in the 99th percentile. The school posted its first growth score in mathematics during 2013-14 when it exceeded the state median by 19 percentile points.

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SUCCESS ACADEMY CHARTER SCHOOL – HARLEM 5

DESCRIPTION	ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL	MATHEMATICS ACCOUNTABILITY PLAN GOAL
Comparative Measure: District Comparison. Each year, the percent of students enrolled at the school in at least their second year performing at or above proficiency in ELA and mathematics will be greater than that of students in the same tested grades in the local school district .	 <p>63 68</p> <p>2013 2014</p>	 <p>87 96</p> <p>2013 2014</p>
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 and mathematics according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.	 <p>3.14 3.49</p> <p>2013 2014</p>	 <p>3.55 3.65</p> <p>2013 2014</p>
Comparative Growth Measure: Mean Growth Percentile. Each year, the school's unadjusted mean growth percentile for all tested students in grades 4-8 will be above the state's unadjusted median growth percentile in ELA and mathematics .	 <p>53.8</p> <p>2014</p>	 <p>69.6</p> <p>2014</p>

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Instructional Leadership. Success Harlem 5 benefits from strong instructional leadership. Leadership teams at both the elementary and middle academies are highly effective in the coaching and professional development of teachers. Leaders report being aware of teacher strengths and weaknesses and hold teachers accountable for network-wide and school specific expectations. Teachers receive significant amounts of coaching and professional development. Many high performing staff are recruited into the Success network leadership training pipeline with the goal of ensuring quality staff to support the opening of new schools. Teachers who do not maximize the professional growth supports provided by the school and the network are not retained.

- As has been the case in previous years, Success Harlem 5 establishes high expectations through an extensive pre-service professional development program provided by its management organization. Through the program and weekly meetings with instructional leaders, teachers are aware of expectations for student performance such as 80% of students being proficient on ELA assessments throughout the year. The network continues to provide Success Harlem 5 with the Qualities of Excellent Teaching (“QET”) rubric, which teachers and leaders use as a resource in running effective instructional environments.
- Success Harlem 5 operates with individual elementary and middle academy leaders. Each leader has his or her own leadership resident, dean of students and education manager. Each member of the leadership team has specific coaching responsibilities. The academy principals and leadership residents provide instructional coaching and the deans of students provide assistance to teachers concerning behavior management. Specific pedagogical foci of each leader allow for the holistic support of teachers in their instructional practice.
- School leaders are in classrooms daily at the school, often giving in the moment feedback to teachers during lessons, or having one-on-one debriefs after a lesson is complete. Leaders also take the opportunity to provide feedback to teachers and grad-level teams at weekly planning meetings. The school includes multiple weekly common prep times for grade-level teams in its schedule and a school leader usually facilitates at least one of the meetings to provide instructional feedback, discuss specific students, help teachers in lesson planning or to talk about recent data by looking at the Success network’s Student Management System (“SMS”) that collects and generates reports from student assessment data.
- In addition to pre-service and ongoing professional development programs the network continues to provide, Success Harlem 5 provides additional robust professional development opportunities for its staff weekly. Professional development is often specifically tailored to the school, basing activities on student data. For example, recent low interim assessment (“IA”) results, as seen through SMS, concerning using evidence from the text to support student responses prompted leaders to create a professional development activity to help teachers teach this skill more effectively in classrooms. Teachers and leaders also have the opportunity to conduct intervisitation days throughout the network, particularly at schools and in classrooms the network identifies as high performing.
- The daily observation of teachers and classrooms by leaders helps to ensure professional development interrelates with classroom practice. Leaders also use other techniques such as studying student work with teachers to observe how professional development activities translate to teacher instructional practice and student interaction with classroom assignments.

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- Leaders at both the elementary and middle academies conduct mid and end-of-year teacher evaluations using the QET rubric the network provides. Leaders also gauge teacher growth using goals teachers set at the beginning of the year that they track during the year through the use of classroom observations and teacher one-on-ones. Formal evaluations take into account student performance and the rate at which teachers met specific academic benchmarks, thereby holding them accountable for student achievement.

Curriculum and Assessment. As has been the case throughout the charter term, the curriculum at Success Harlem 5 supports teachers in their instructional planning. In addition, the school continues to have an assessment system that improves instructional effectiveness and student learning.

- Success Harlem 5 uses scope and sequence materials, assessment calendars, and unit and lesson plans the network develops to guide the planning and delivery of lessons. Instructional leaders report that network content area teams provide teachers with these guiding documents for ELA, math, science and project based learning (social studies).
- School leaders report network content area teams are responsible for selecting, developing, and reviewing or revising curriculum documents, resources, and assessments that support delivery of the curriculum and monitoring of student learning. School leaders and documents confirm that the school relies upon commercial materials in its Kindergarten classrooms to support the development of early literacy skills. The site visit team observed, and a review of scholar work revealed, that the network develops all other curriculum materials, which school leaders and teachers may adjust, sometimes upon consultation with network staff. Leaders report making few changes to the curriculum between the 2013-14 and 2014-15 school years, outside of the 5th grade where new curriculum materials were developed.
- In addition, the school continues to regularly administer valid and reliable assessments that align to the network's curriculum and state performance standards. For example, a review of Success Harlem 5's assessment calendar found that in addition to administering the New York State Testing Program's assessments, the school also administers a range of assessments including weekly and interim assessments the network creates and other commercial assessments to gauge student growth in reading and math.
- In concert with previous years, Success Harlem 5 makes assessment data accessible to teachers, school leaders and other stakeholders. School leaders report that the network uses the SMS that collects and reports on all student data. Leaders also report that the data is available to them and teachers almost immediately after the administration of each assessment, and that it is a school-wide expectation that all staff actively monitor and reflect upon school-level, grade-level and classroom-level results.
- Instructional leaders also report that teachers are responsible for adjusting lesson plans to meet the needs of the individual students within their classrooms, based on student achievement data. According to the school's leaders, teachers might identify students for small group instruction or re-teaching using this information. For example, during a leadership interview, one of the school's instructional leaders reported that, in delving deeply into student data, the team hypothesized that students do not demonstrate mastery on a particular skill because they fail to listen carefully to instructions; she said that the teachers would be

RENEWAL BENCHMARK CONCLUSIONS

working closely with those students to ensure that they understood the task before releasing them for independent practice. In fact, during classroom observations, an observer noted that the teacher and assistant teacher clarified task instructions with two small groups of students.

- School leaders use assessment results to evaluate teacher effectiveness and to develop professional development and coaching strategies. Instructional leaders state that student achievement data informs teacher evaluation and re-contracting/re-hiring decisions. School leaders report that teacher, leader and network goals all include quantitative measures of student performance.
- The school regularly communicates to parents/guardians about their students' progress and growth. Instructional leaders report that the school continues to create proactive systems to inform parents and guardians about their students' progress. For example, in addition to sending student work home to students in their Friday folders, instructional leaders indicated that the school makes a commitment to informing parents and guardians of all network and school-wide assessment results within 24-48 hours after assessment administration. One instructional leader reported that parents also receive monthly scholar reports (outlining absences, tardies, behavioral and academic data), as well as progress reports/report cards each quarter.
- Of note is the portion of the school's curriculum that addresses problem solving, strategy, math and the arts. Success Harlem 5 students play chess, learn to play musical instruments, ballroom dance and have strong visual /media arts instruction. The school uses these curricular components expertly to support instruction in all content areas.

Pedagogy. Strong instruction is evident throughout Success Harlem 5. As shown in the chart below, during the renewal visit, Institute team members conducted 10 classroom observations following a defined protocol used in all school renewal visits

CLASSROOM OBSERVATION METHODOLOGY: NUMBER OF OBSERVATIONS

		GRADE						
		K	1	2	3	4	5	Total
CONTENT AREA	ELA	1	1	1	3			6
	Math		1	1			1	3
	Writing					1		1
	Science							
	Soc Stu							
	Specials							
	Total	1	2	2	3	1	1	10

- Most teachers continue to deliver purposeful lessons with clear objectives that align to the school's curriculum (8 out of 10 classroom observations). Lesson activities are purposeful and

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align to stated objectives which teachers communicate, referencing them throughout lessons. Also, in classes with co-teachers, both teachers have clear roles including whole-group lesson facilitation and monitoring student work.

- Throughout Success Harlem 5, the majority of teachers regularly and effectively use techniques to check for student understanding by conferencing one-on-one with students during individual work time, monitoring student written work in small groups and using signals during whole-group portions of lessons (8 out of 10 classroom observations). In rare cases, teacher monitoring consists more of ensuring students are behaviorally on task, not actually noting whether or not students are grasping the lesson content.
- Ninety percent of Success Harlem 5 teachers observed challenge students to defend or elaborate on their answers. In one classroom, the teacher particularly prompted other students to explain why one student's process for solving a math problem was or was not correct, which also reflects an emphasis on peer-to-peer interaction seen in other classrooms. However, only half of classrooms observed include opportunities to challenge students with assignments, questions and activities that develop higher-order thinking and problem solving skills (5 out of 10 classroom observations). Leaders reported that in ELA classes, the focus at the time of the renewal visit was specifically on teaching students how to pull evidence from different texts, which in itself may limit the opportunity for many higher-order thinking opportunities. The school's strong record of student achievement supports this assertion.
- Teachers continue to establish and maintain environments with a consistent focus on academic achievement across most Success Harlem 5 classrooms (8 out of 10 classroom observations). Teachers have a sense of urgency for learning and communicate this urgency to students through the use of timers and call-and-response signals. These methods also help with the appropriate pacing and smooth transition of lessons.

At-Risk Students. Success Harlem 5 continues to meet the needs of at-risk students within and outside of the regular education classrooms. The school's data-driven approach to monitoring student-learning and delivering instruction ensures that students requiring special education services, ELLs and other at-risk students perform about as well as their general education peers.

- The school continues to implement generally accepted procedures for identifying at-risk students including students with disabilities, ELLs and those struggling academically. According to school leaders, teachers are able to refer struggling students to a school-based support team (consisting of the school principal, leadership resident, education manager and school counselor). Leaders indicated that the team will review the student's data and work and identify suggested interventions to improve student learning, as well as specific scholar goals and a timeframe for re-evaluation. At the end of the intervention period, school staff evaluates the student's progress. In the event that the student has not made sufficient progress, the school refers the student for evaluation by the special education team. In addition, the school's assessment calendar indicates that Success Harlem 5 administers the New York State Identification Test for English Language Learners (NYSITELL) and the New York State English as a Second Language Test ("NYSESLAT").

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- Success Harlem 5 has adequate intervention programs to meet the needs of at-risk students. The school serves students with disabilities in an inclusion model, with pull out supports available through the use of Special Education Teacher Support Services (“SETSS”) as needed or required by students’ Individualized Education Programs (“IEPs”). As is the case throughout the network, Success Harlem 5 implements an immersion model to serve ELLs. ELLs and general education students who are struggling may receive additional pull out supports from the SETSS teacher in addition to small group instruction within the regular education classroom. Although renewal site visit team members did not observe this practice at the time of the visit, school leaders reported that specialists provide push in to classrooms during literacy and mathematics in order to support additional small group instruction to students. The school has a full-time psychologist on staff to provide social/emotional counseling and support to Success Harlem 5’s students. Lastly, school leaders reported that they monitor the effectiveness of interventions for at-risk students by disaggregating subgroup data on a regular basis.
- Success Harlem 5 supports teachers in their efforts to meet the needs of struggling students through network-based, school-level and external professional development opportunities. The network provides professional development opportunities focusing on topics such as literacy interventions. The Institute also notes that teachers attend external professional development opportunities that focus on serving the needs of at-risk students throughout the year.

		2011-12	2012-13	2013-14
Enrollment (N) Receiving Mandated Academic Services		(35)	(52)	(47)
RESULTS	Tested on State Exams (N)	(N/A)	(11)	(31)
	Percent Proficient on ELA Exam	N/A	18.2	48.4
	Percent Proficient Statewide	15.2	5.0	5.2

		2011-12	2012-13	2013-14
ELL Enrollment (N)		(24)	(29)	(38)
RESULTS	Tested on NYSESLAT ⁹ Exam (N)	(N/A)	(N/A)	(38)
	Percent ‘Proficient’ or Making Progress ¹⁰ on NYSESLAT	N/A	N/A	42.1

⁹ New York State English as a Second Language Achievement Test, a standardized state exam.

¹⁰ Defined as moving up at least one level of proficiency. Student scores fall into four categories/proficiency levels: Beginning; Intermediate; Advanced; and, Proficient.

RENEWAL BENCHMARK CONCLUSIONS

IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

Success Harlem 5 is an effective and viable organization. The education corporation board carries out its oversight responsibilities with an unrelenting focus on student achievement. The school organization effectively supports the delivery of the educational program. During the current term the board has generally abided by its by-laws and been in general and substantial compliance with the terms of its charter, code of ethics, applicable state and federal law, rules and regulations.

ORGANIZATIONAL STRUCTURE

Board Oversight. The SACS-NYC board maintains unwavering focus on student achievement and works effectively to support the school in meeting its academic Accountability Plan goals. The trustees of SACS-NYC also oversee the other 24 operating schools within the merged education corporation, each of which maintains an informal advisory committee. The board requires detailed reports from network representatives and school leaders. It uses these reports effectively to provide rigorous oversight of the educational program.

- The composition of the education corporation board includes members with a diverse set of skills relevant to school governance. The board delegates day-to-day management of the schools to the Success network.
- The board carefully reviews regular reports on academic performance and fiscal status of the school. The detailed data equip the board to provide rigorous oversight of the educational program. In addition to reviewing individual school data and trends, the board compares the school's performance compared to other schools within the network and across the state. The network generally supplies these reports prior to each board meeting, and school leaders present information directly to the board several times a year.
- The board establishes clear priorities and long-range goals. It is well-versed in the school's Accountability Plan and the metrics used to evaluate performance against those goals. The board directs ample resources to school leaders and schools to ensure achievement of those goals.
- The board holds school leaders and the network accountable for high student achievement. The board selects school leaders based largely on network recommendations then delegates ongoing leader evaluation to the network. It does not have a self-evaluation in place.

Organizational Capacity. Success Harlem 5's organization effectively supports the delivery of the educational program. Although the network does not mandate specific collaboration between the elementary and middle academy leaders, both leaders report having extensive conversations around how to best support students and families as they transition to the school's upper grades.

- With assistance from separate Success network managing directors at both the elementary and middle academies, Success Harlem 5 continues to have an administrative structure with sound systems and procedures that allow the school to implement its academic program.

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- Success Harlem 5 at both academies continues to have an organizational structure including instructional leaders, data specialists known as education managers and business managers that provide a clear accountability system and reporting protocol that teachers and leaders follow.
- The school's dean of students and individual classroom teachers continue to implement clear discipline policies, utilizing behavior charts and consequence and incentive systems the school consistently applies across classrooms.
- Due to restructuring of middle academies in the Manhattan/Bronx Success network cohort, many Success Harlem 5 middle academy teachers now work in another network school in the area. However, leaders report most other teachers leaving to take on leadership roles in the network or for personal reasons. Despite the middle academy leader having asked two teachers not to return during this school year, the elementary academy leader noted not removing anyone during his tenure at the school.
- As has been the case in previous years of the charter term, Success Harlem 5 allocates sufficient resources in meeting the school's goals. The network provides the school with ample materials to support the academic program and leaders report certain levels of autonomy in the use of curriculum and personnel resources.
- Success Harlem 5 maintains adequate student enrollment with 510 students and reports 2,086 students on its waitlist.
- The school has procedures in place to monitor its progress toward meeting enrollment and retention targets for special education students, ELLs and students who qualify for free and reduced price lunch, and recruits students through the use of flyers and other forms of advertising.
- Success Harlem 5 regularly monitors and evaluates its program and consults with the Success network if they feel any changes are necessary for its specific population of students. Leaders report the network SMS as essential to monitoring the effectiveness of the academic program, using it to reflect on areas of weakness and to help determine future academic foci as well as types of professional development and network intervisitation opportunities that may be useful for teachers and leaders.

FAITHFULNESS TO CHARTER & PARENT SATISFACTION

As part of their initial applications and their Applications for Charter Renewal, schools identify the Key Design Elements that reflect their missions and distinguish the schools. The table below reflects the intended Key Design Elements and indicates for each if the school is implementing the element as included in the school's charter.

RENEWAL BENCHMARK CONCLUSIONS

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

Parent Satisfaction. Parents/guardians and students are satisfied with the school.¹¹ The Institute compiled data from NYCDOE's 2013-2014 NYC School Survey. NYCDOE distributes the survey to families each year to compile data about school culture, instruction, and systems for improvement. Results from the 2013-2014 survey indicate parents/guardians and students are satisfied with the school. The survey response rate is sufficiently high enough that it is useful in framing the results as representative of the school community.

2013-14
Response Rate: 35%
Instructional Core: 99%
Systems for Improvement: 97%
School Culture: 97%

Persistence in Enrollment. The Institute derived the following statistical information from its database. No comparative data from NYCDOE or NYSED is available to the Institute to provide either district wide or by CSD context. As such, the information is presented for information purposes but does not allow for comparative analysis.

	2011-12	2012-13	2013-14
Percent of Eligible Students Returning From Previous Year	85.6	85.8	94.5

¹¹ Source: NY School Survey 2013-14 Report.

RENEWAL BENCHMARK CONCLUSIONS

COMPLIANCE

Governance. In material respects, the education corporation board has implemented and abided by adequate and appropriate systems, processes, policies and procedures to ensure the effective governance and oversight of the school. Many of these structures are in place at other Success charter schools. The board demonstrates a thorough understanding of its role in holding Success and the school leadership accountable for both academic results and fiscal soundness.

- The board of trustees has generally avoided creating conflicts of interest where possible, and where conflicts exist, the board has managed those conflicts in a clear and transparent manner through recusal.
- The board has materially complied with the terms of its by-laws.
- The board has a functioning committee structure.
- The board receives specific and extensive reports on academics, finance, facilities and development of the school as well as its academic and fiscal performance.
- The board appropriately sought the initial merger of the school with four other schools into one education corporation in 2012.
- The board successfully sought an expansion of all schools it has the authority to operate to full K-12 models dependent upon the successful meeting of renewal outcomes.

Legal Requirements. The education corporation generally and substantially complies with applicable state and federal laws, rules and regulations and the provisions of its charter.

- **Complaints.** The school has generated several informal complaints regarding school lunches and facilities, but no formal complaints have been received by the Institute.
- **Violations.** The Institute did not issue any violation letters to the education corporation regarding Success Harlem 5.
- **Charter Amendments.** The education corporation has properly amended its charter to change admissions at-risk designations and to amend its management contract with Success.

RENEWAL BENCHMARK CONCLUSIONS

IS THE EDUCATION CORPORATION FISCALLY SOUND?

Based on evidence collected through the renewal review, Success Harlem 5 is fiscally sound. The Institute also analyzed the financial status of the school's merged education corporation, SACS-NYC and found it too to be sound.

Effective October 1, 2012, Success Harlem 5 merged into SACS-NYC. Although, the pre-merger education corporation had relied upon contributions distributed from network fund raising activities during its initial start up years, the pre-merger education corporation consistently generated net operating revenue surpluses in early years, and post-merger, successfully managed cash flow and has adequate financial resources to ensure stable operations. The education corporation engages in realistic budgeting practices and conducts routine monitoring of revenues and expenses, making appropriate adjustments when necessary.

The education corporation contracts with the Success network to provide educational management and operational services. Additionally, the network supports fiscal operations by securing adequate facilities, fundraising, preparing financial reports and budgets, recording and tracking income and expenses related to grants and contracts, recording accounts payable invoices and cash receipts, preparing vendor checks, providing payroll services, reconciling bank accounts, safeguarding school assets, and managing all year-end financial and compliance reporting. For these services, the network receives 15% of general education per pupil funding. While the Success financial model intends that all fully enrolled schools are financially sustainable, operating its program solely on public funding, the pre-merger Success Harlem 5 education corporation received approximately \$503k in charitable contributions during its first year of operation that do not have to be repaid.

Budgeting and Long-Range Planning. Working in partnership with the network, SACS-NYC employs clear budgetary objectives and budget preparation procedures for Success Harlem 5. The network finance team coordinates the development of annual and long-term budgets with input from the school leadership staff including the business operations manager and the board finance committee. The annual budget is presented to the full education corporation board for consideration and approval.

- The education corporation develops realistic budgets and monitors them continually.
- The network works closely with the school's business operations manager in preparing extensive financial reports that are reviewed on a continual basis.
- The network stated that the board finance committee reviews financial reports.
- The projected five-year renewal budget reflects anticipated increases in revenues and expenses associated with planned enrollment growth as the school expands through grade 10 by the 5th year of the term of authority to operate the school.
- The education corporation prepares a long-term budget for the school, which is updated on an annual basis.

RENEWAL BENCHMARK CONCLUSIONS

- Success Harlem 5 has been located in shared NYCDOE facility space since opening in 2010. Success Harlem 5 is not responsible for rent, utilities, custodial services, maintenance or school safety services.
- Effective October 1, 2012, Success Harlem 5 merged with four other charter school education corporations into SACS-NYC. A second merger, effective July 1, 2014, added seven more education corporations into the merged education corporation. The merger allowed for operating efficiencies, increased purchasing power, shared expenses with the SACS-NYC's 23 other schools under common management.

Internal Controls. Success Harlem 5 and SACS-NYC have a history of sound fiscal policies, procedures and practices and maintain appropriate internal controls.

- SACS-NYC Financial Policies and Procedures Manual guides all internal controls and procedures at Success Harlem 5. The manual contains fiscal policies and procedures and undergoes ongoing reviews, with substantive updates requiring Board approval.
- SACS-NYC provides the individual school's business operations manager and other key administrative staff members with professional development activities throughout the school year.
- SACS-NYC merged education corporation audit reports for June 30, 2014 and 2013 had no findings of deficiencies.
- SACS-NYC as a merged education corporation has established a Dissolution Reserve Fund of \$350,000 in accordance with SUNY authorized charter agreement that requires the separate fund to be established for the purpose of covering legal and administrative costs associated with a school closure.

Financial Reporting. Success Harlem 5 as part of the merged education corporation, SACS-NYC, has complied with financial reporting requirements by providing SUNY, NYSED and the NYCDOE with required financial reports that were on time, complete and followed generally accepted accounting principles ("GAAP").

- The merged education corporation presents its annual financial statements in accordance with GAAP and the independent audits of those statements have received unqualified opinions.
- The merged education corporation has generally filed key reports timely and accurately including: audit reports, budgets, cash-flow statements, unaudited reports of revenue, expenses and enrollments.

Financial Condition. Success Harlem 5 as part of the merged education corporation, SACS-NYC, maintains adequate financial resources to ensure stable operations.

RENEWAL BENCHMARK CONCLUSIONS

- The merged education corporation, SACS-NYC, has posted a fiscally strong composite score on the Institute's fiscal dashboard.¹²
- As of June 30, 2014, the merged education corporation, SACS-NYC, had total net assets of approximately \$18M, down from the previous year \$20M balance. Fundraising contributions in excess of \$1.4M over the two fiscal years has helped the fiscal position. Opening and start-up costs as the education corporation has grown its number of schools has resulted in operating deficits of \$3M for fiscal year 2013-14 and \$1.3M for fiscal year 2012-13. Individually, Success Harlem 5 posted operating surpluses without fundraising contributions in all but its first year of operation.
- At various dates from July 2012 through June 2014, SACS-NYC signed loan agreements with the network totaling \$2.7 million with annual interest equal to the prevailing interest rate. The loans and any accrued unpaid interest are due in full within three years of the agreement. The proceeds were used to finance SACS-NYC's operations. As of June 30, 2014 the outstanding principal balance was the full \$2.7 million.
- Success Harlem 5 and the merged education corporation, SACS-NYC, have maintained adequate cash flow over the charter term and on average 1.2 months of cash reserves to cover current bills and those coming due shortly. The recommended cash reserve would be a minimum of one month reserve therefore the SUNY Fiscal Dashboard reflects a medium risk in this category.

The SUNY Fiscal Dashboard, provided in the Appendix, presents color-coded tables and charts indicating that Success Harlem 5 and the merged education corporation, SACS-NYC, have consistently demonstrated fiscal soundness over the course of its term of authority to operate the school.¹³

¹² The composite score assists in measuring the financial health of an education corporation using a blended score that measures the school's performance on key financial indicators. The blended score offsets financial strengths against areas where there may be financial weaknesses.

¹³ 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.

RENEWAL BENCHMARK CONCLUSIONS

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

To the extent that Success Harlem 5 has met its academic Accountability Plan goals, has in place a strong and effective educational program that supports achieving those goals, operates as an effective and viable organization and its education corporation is fiscally sound, the plans to implement the school's educational program as proposed during the next term of authority to operate the school are reasonable, feasible and achievable.

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

MISSION FOR THE NEXT CHARTER TERM

The mission of Success Academy Charter School-Harlem 5 is to provide students in New York City with an exceptionally high-quality education that gives them the knowledge, skills, character and disposition to meet and exceed NY State Common Core Learning Standards, and the resources to lead and succeed in school, college and a competitive global economy.

Success Harlem 5 seeks to provide this exceptionally high-quality education to all of their students, including English language learners and students with special education needs, irrespective of socioeconomic, racial, ethnic and/or other status.

Plans for the Educational Program. Success Harlem 5 plans to expand the current program through 10th grade using the current Success Academies model, which is in place at other SUNY authorized schools. The high school program would eventually be a full 9-12 program (assuming further renewal) and would likely be housed in a co-located facility.

	Current Charter Term	End of Next Charter Term
Enrollment	540	880
Grade Span	K-5	K-10
Teaching Staff	42 (Grades K-5)	61 (Grades K-10)
Days of Instruction	181	181

RENEWAL BENCHMARK CONCLUSIONS

Plans for Board Oversight and Governance. Board members express an interest in continuing to serve SACS-NYC in the next charter term and may add additional members in the future.

Fiscal & Facility Plans. Success Harlem 5 plans to continue providing instruction for Kindergarten through 8th grade in the school's current NYCDOE facilities. The school plans to seek NYCDOE co-located space to serve future high school grades.

The education corporation's Application for Charter Renewal for Success Harlem 5 contains all necessary elements as required by the Act for the education corporation to renew its authority to operate the school. The proposed school calendar allots an appropriate amount of instructional time and exceeds 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. The education corporation has amended or will amend other key aspects of the renewal application -- including bylaws and code of ethics -- to comply with various provisions of the New York Education Law, Not-for-Profit Corporation Law, Public Officers Law and the General Municipal Law, as appropriate.

APPENDIX: SCHOOL OVERVIEW

Mission Statement

The mission of Success Academy Charter School-Harlem 5 is to provide students in New York City with an exceptionally high-quality education that gives them the knowledge, skills, character and disposition to meet and exceed NY State Common Core Learning Standards, and the resources to lead and succeed in school, college and a competitive global economy.

Success Harlem 5 seeks to provide this exceptionally high-quality education to all of their students, including English language learners and students with special education needs, irrespective of socioeconomic, racial, ethnic and or/other status.

Board of Trustees¹⁴

Board Member Name	Position
Samuel Cole	Chair
Bryan Binder	Vice Chair
Scott Friedman	Treasurer
Greg Sawers	Secretary
Rich Barrera	Trustee
Derrell Bradford	Trustee
Sam Chainani	Trustee
Suleman Lunat	Trustee
David Nanus	Trustee
Graham Officer	Trustee
Jarrett Posner	Trustee
Lance Rosen	Trustee
Cate Shinker	Trustee
Khadijah Pickel	Ex-officio Parent Representative

¹⁴ Source: The Institute’s Board records at the time of the Renewal Review.

APPENDIX: SCHOOL OVERVIEW

School Characteristics

School Year	Proposed Enrollment	Actual Enrollment ¹⁵	Proposed Grades	Actual Grades
2010-11	180	181	K-1	K-1
2011-12	249	244	K-2	K-2
2012-13	398	322	K-3	K-3
2013-14	476	521	K-4	K-4
2014-15	540	522	K-5	K-5

Student Demographics

	2011-12		2012-13		2013-14 ¹⁶
	% of School Enrollment	% of NYC CSD 5 Enrollment	% of School Enrollment	% of NYC CSD 5 Enrollment	% of School Enrollment
Race/Ethnicity					
American Indian or Alaska Native	1	1	1	1	1
Black or African American	67	55	66	53	66
Hispanic	29	39	30	40	29
Asian, Native Hawaiian, or Pacific Islander	0	3	1	3	1
White	0	3	0	3	2
Multiracial	2	0	2	0	1
Special Populations					
Students with Disabilities	14	18	14	18	14
English Language Learners	10	12	10	11	10
Free/Reduced Lunch					
Eligible for Free Lunch	75	75	70	79	-- ¹⁷
Eligible for Reduced-Price Lunch	9	5	16	5	--
Economically Disadvantaged	83	87	87	86	87

¹⁵ Source: The Institute's Official Enrollment Binder. (Figures may differ slightly from New York State Report Cards, depending on date of data collection.)

¹⁶ The Institute derived the 2013-14 Students with Disabilities, ELL and Economically Disadvantaged statistics from the school's October 2013 student enrollment report to NYSED (2013-14 BEDS Report). District data are not yet available. Because NYSED releases data up to a full year after the conclusion of any one school year, the data presented in this table may differ from current information reported by the school and included in this report.

¹⁷ School free and reduced priced lunch data is not yet available for the 2013-14 school year.

APPENDIX: SCHOOL OVERVIEW

School Leaders

School Year(s)	Name(s) and Title(s)
2010-11 to 2012-13	Stacey Gershkovich, Principal
2013-14 to Present	Khari Shabazz, Principal (Grades K-3)
2013-14 to Present	Lisa Sun, Principal (Grades 4-5)

School Visit History

School Year	Visit Type	Evaluator (Institute/External)	Date
2010-11	First Year Visit	Institute	May 5, 2011
2014-15	Initial Renewal Visit	Institute	December 2, 2014

Conduct of the Renewal Visit

Date(s) of Visit	Evaluation Team Members	Title
December 2, 2014	Aaron Campbell	Senior Analyst
	Kim Wechtenhiser	External Consultant

APPENDIX: FISCAL DASHBOARD



Success Academy Charter School - Harlem 5

NOTE: This school has merged into the education corporation, "Success Academy Charter School - NYC." Only the "Statement of Activities" which includes the individual school's operating revenues and expenses is reported. See the overall merged education corporation for other data (Code # = "500").

SCHOOL INFORMATION

FINANCIAL POSITION

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**

L-T Debt and Notes Payable, net current maturities

Total Liabilities - **GRAPH 1**

Net Assets

Unrestricted
Temporarily restricted

Total Net Assets

Total Liabilities and Net Assets

ACTIVITIES

Operating Revenue

Resident Student Enrollment
Students with Disabilities

Grants and Contracts

State and local
Federal - Title and IDEA
Federal - Other
Other

Food Service/Child Nutrition Program

Total Operating Revenue

Expenses

Regular Education
SPED
Regular Education & SPED (combined)
Other

Total Program Services

Management and General
Fundraising

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

Surplus / (Deficit) From School Operations

Support and Other Revenue

Contributions
Fundraising
Miscellaneous Income
Net assets released from restriction

Total Support and Other Revenue

Total Unrestricted Revenue

Total Temporarily Restricted Revenue

Total Revenue - **GRAPHS 2 & 3**

Change in Net Assets

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

Prior Year Adjustment(s)

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

Opened 2010-11

2009-10	2010-11	2011-12	2012-13	2013-14
-	1,313,658	1,448,140	-	-
-	264,712	113,823	-	-
-	-	-	-	-
-	825	-	-	-
-	-	-	-	-
-	1,579,195	1,561,963	-	-
-	214,742	179,073	-	-
-	25,049	50,192	-	-
-	1,818,986	1,791,228	-	-

-	72,517	17,039	-	-
-	98,647	52,392	-	-
-	57,254	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	89,512	-	-
-	228,418	158,943	-	-
-	500,000	-	-	-
-	728,418	158,943	-	-

-	1,090,568	1,632,285	-	-
-	-	-	-	-
-	1,090,568	1,632,285	-	-
-	1,818,986	1,791,228	-	-

-	2,445,182	3,264,065	4,654,513	7,142,479
-	88,985	377,080	-	663,074

-	131,977	-	50,000	-
-	99,045	163,805	249,463	227,676
-	556,993	50,123	-	52,198
-	-	-	-	-
-	-	-	-	-
-	3,322,182	3,855,072	4,953,976	8,085,427

-	1,885,171	2,291,256	3,232,839	5,764,703
-	306,058	502,218	696,190	786,118
-	-	-	-	-
-	-	-	-	-
-	2,191,229	2,793,474	3,929,029	6,550,821
-	630,501	520,198	998,591	1,566,077
-	-	-	-	-
-	2,821,730	3,313,672	4,927,620	8,116,898
-	500,452	541,400	26,356	(31,471)

-	503,270	-	-	-
-	-	-	-	-
-	86,846	317	23,637	2,637
-	-	-	-	-
-	590,116	317	23,637	2,637

-	3,912,298	3,855,389	4,977,613	8,088,064
-	-	-	-	-
-	3,912,298	3,855,389	4,977,613	8,088,064

-	1,090,568	541,717	49,993	(28,834)
-	-	1,090,568	1,632,285	1,682,279
-	-	-	-	-
-	1,090,568	1,632,285	1,682,278	1,653,446

APPENDIX: FISCAL DASHBOARD



Success Academy Charter School - Harlem 5

NOTE: This school has merged into the education corporation, "Success Academy Charter School - NYC." Only the "Statement of Activities" which includes the individual school's operating revenues and expenses is reported. See the overall merged education corporation for other data (Code # = "500").

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2009-10	2010-11	2011-12	2012-13	2013-14
Personnel Service	-	198,568	412,864	-	914,477
Administrative Staff Personnel	-	1,019,940	1,214,789	-	3,200,946
Instructional Personnel	-	-	-	-	-
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	-	-
Total Salaries and Staff	-	1,218,508	1,627,653	-	4,115,423
Fringe Benefits & Payroll Taxes	-	259,778	288,288	-	791,840
Retirement	-	24,695	36,093	-	72,854
Management Company Fees	-	244,457	326,325	-	885,896
Building and Land Rent / Lease	-	-	-	-	-
Staff Development	-	57,656	87,792	-	140,637
Professional Fees, Consultant & Purchased Services	-	125,089	20,317	-	22,046
Marketing / Recruitment	-	204,276	168,729	-	124,851
Student Supplies, Materials & Services	-	394,368	290,247	-	696,930
Depreciation	-	40,452	177,571	-	298,954
Other	-	252,451	290,656	-	967,468
Total Expenses	-	2,821,730	3,313,672	-	8,116,898

SCHOOL ANALYSIS

ENROLLMENT

	2009-10	2010-11	2011-12	2012-13	2013-14
Chartered Enroll	-	180	249	398	482
Revised Enroll	-	-	-	-	476
Actual Enroll - GRAPH 4	-	181	244	322	521
Chartered Grades	Planning	K-1	K-2	K-3	K-4
Revised Grades	-	-	-	-	-

Primary School District: NYC

Per Pupil Funding (Weighted Avg of All Districts)	-	13,527	13,527	13,527	13,527
Increase over prior year	0.0%	8.7%	0.0%	0.0%	0.0%

PER STUDENT BREAKDOWN

	2009-10	2010-11	2011-12	2012-13	2013-14	Average - 5 Yrs. OR Charter Term
Revenue	-	18,379	15,829	15,385	15,519	32,556
Operating	-	18,379	15,829	15,385	15,519	32,556
Other Revenue and Support	-	3,265	1	73	5	1,672
TOTAL - GRAPH 3	-	21,643	15,830	15,458	15,524	34,228
Expenses	-	12,122	11,470	12,202	12,574	24,184
Program Services	-	12,122	11,470	12,202	12,574	24,184
Management and General, Fundraising	-	3,488	2,136	3,101	3,006	5,866
TOTAL - GRAPH 3	-	15,610	13,606	15,303	15,579	30,049
% of Program Services	0.0%	77.7%	84.3%	79.7%	80.7%	161.2%
% of Management and Other	0.0%	22.3%	15.7%	20.3%	19.3%	38.8%
% of Revenue Exceeding Expenses - GRAPH 5	0.0%	38.6%	16.3%	1.0%	-0.4%	13.9%

Student to Faculty Ratio

	-	7.7	10.1	-	9.8
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Faculty to Admin Ratio

	-	4.3	4.0	-	4.1
--	---	-----	-----	---	-----

Financial Responsibility Composite Scores - GRAPH 6

Score	0.0	3.0	3.0	0.0	0.0	0.0
Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	N/A	Fiscally Strong	Fiscally Strong	N/A	N/A	N/A

Working Capital - GRAPH 7

Net Working Capital	0	1,350,777	1,403,020	0	0	0
As % of Unrestricted Revenue	0.0%	34.5%	36.4%	0.0%	0.0%	0.0%
Working Capital (Current) Ratio Score	0.0	6.9	9.8	0.0	0.0	0.0
Risk (Low > 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	LOW	LOW	N/A	N/A	N/A
Rating (Excellent > 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	Excellent	Excellent	N/A	N/A	N/A

Quick (Acid Test) Ratio

Score	0.0	6.9	9.8	0.0	0.0	0.0
Risk (Low > 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	LOW	LOW	N/A	N/A	N/A
Rating (Excellent > 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	Excellent	Excellent	N/A	N/A	N/A

Debt to Asset Ratio - GRAPH 7

Score	0.0	0.4	0.1	0.0	0.0	0.0
Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	LOW	LOW	N/A	N/A	N/A
Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	Excellent	Excellent	N/A	N/A	N/A

Months of Cash - GRAPH 8

Score	0.0	5.6	5.2	0.0	0.0	0.0
Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	LOW	LOW	N/A	N/A	N/A
Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	Excellent	Excellent	N/A	N/A	N/A

APPENDIX: FISCAL DASHBOARD



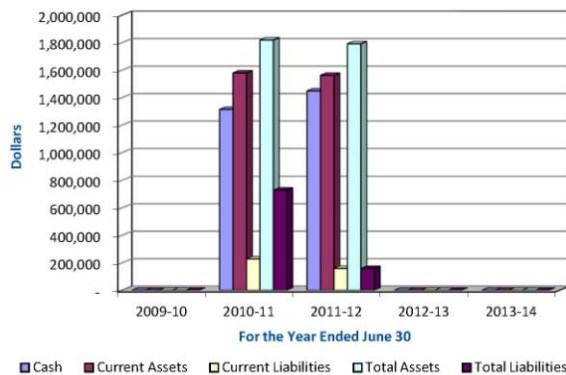
Charter Schools Institute
The State University of New York

Success Academy Charter School - Harlem

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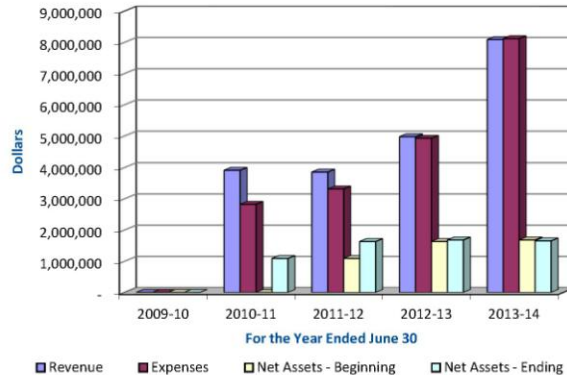
NOTE: This school has merged into the education corporation, "Success Academy Charter School - NYC." Only the "Statement of Activities" which includes the individual school's operating revenues and expenses is reported. See the overall merged education corporation for other data (Code # = "500").

GRAPH 1 Cash, Assets and Liabilities



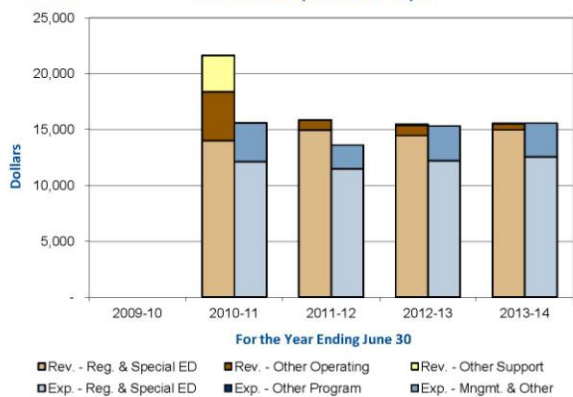
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GRAPH 2 Revenue, Expenses and Net Assets



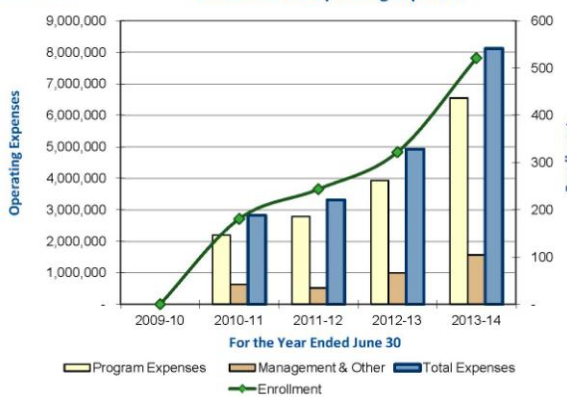
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APPENDIX: FISCAL DASHBOARD



Charter Schools Institute
The State University of New York

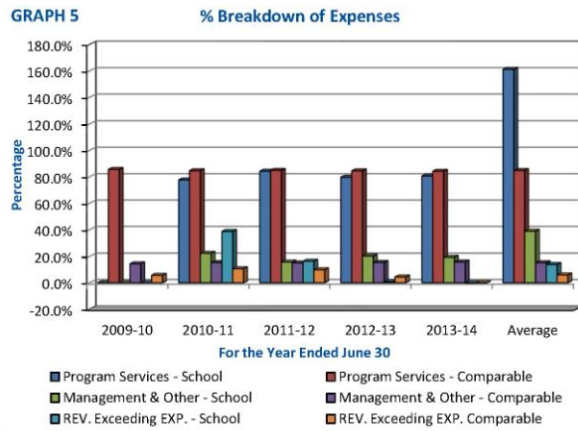
Success Academy Charter School - Harlem

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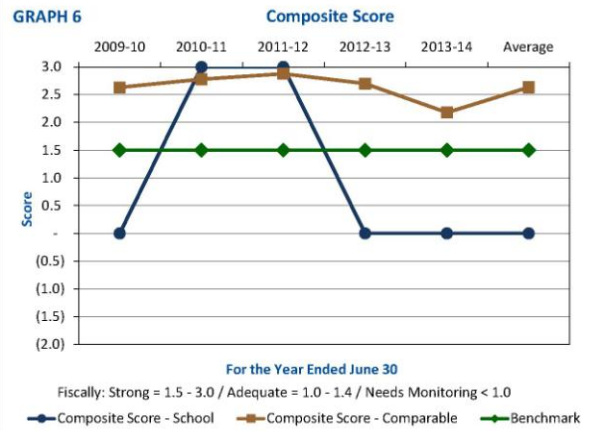
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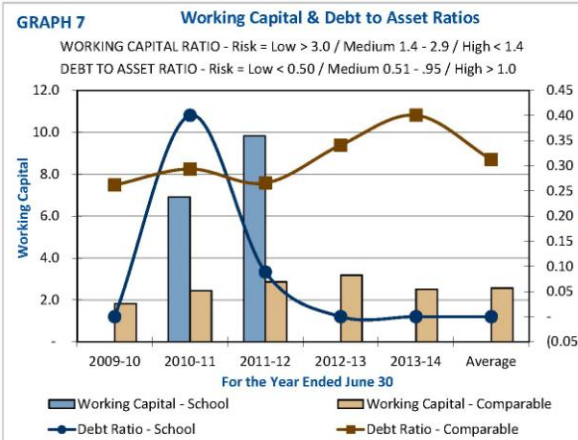
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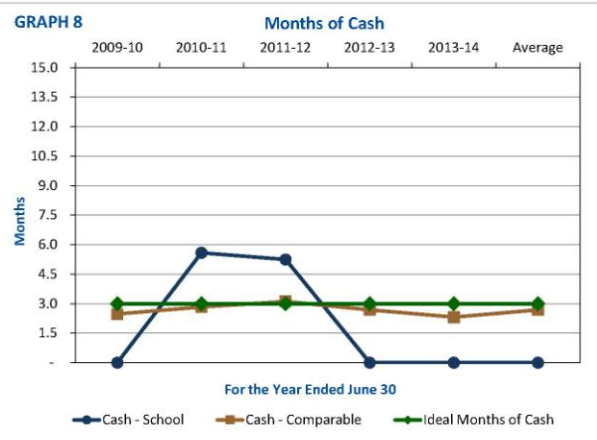
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APPENDIX: FISCAL DASHBOARD



Success Academy Charter Schools - NYC (Merged)

SCHOOL INFORMATION					
FINANCIAL POSITION		Opened 2012-13			
Assets					
Current Assets		2009-10	2010-11	2011-12	2012-13
	Cash and Cash Equivalents - GRAPH 1	-	-	-	4,983,066
	Grants and Contracts Receivable	-	-	-	1,860,018
	Accounts Receivable	-	-	-	-
	Prepaid Expenses	-	-	-	1,710,515
	Contributions and Other Receivables	-	-	-	-
Total Current Assets - GRAPH 1		-	-	-	8,553,599
	Property, Building and Equipment, net	-	-	-	3,985,758
	Other Assets	-	-	-	11,522,347
Total Assets - GRAPH 1		-	-	-	24,061,704
Liabilities and Net Assets					
Current Liabilities					
	Accounts Payable and Accrued Expenses	-	-	-	308,817
	Accrued Payroll and Benefits	-	-	-	-
	Deferred Revenue	-	-	-	-
	Current Maturities of Long-Term Debt	-	-	-	-
	Short Term Debt - Bonds, Notes Payable	-	-	-	-
	Other	-	-	-	2,153,385
Total Current Liabilities - GRAPH 1		-	-	-	2,462,202
	L-T Debt and Notes Payable, net current maturities	-	-	-	1,450,000
Total Liabilities - GRAPH 1		-	-	-	3,912,202
Net Assets					
	Unrestricted	-	-	-	20,149,502
	Temporarily restricted	-	-	-	-
Total Net Assets		-	-	-	20,149,502
Total Liabilities and Net Assets		-	-	-	24,061,704
ACTIVITIES					
Operating Revenue					
	Resident Student Enrollment	-	-	-	41,017,028
	Students with Disabilities	-	-	-	-
Grants and Contracts					
	State and local	-	-	-	314,515
	Federal - Title and IDEA	-	-	-	3,308,294
	Federal - Other	-	-	-	-
	Other	-	-	-	-
	Food Service/Child Nutrition Program	-	-	-	-
Total Operating Revenue		-	-	-	44,639,837
Expenses					
	Regular Education	-	-	-	30,095,202
	SPED	-	-	-	7,447,352
	Regular Education & SPED (combined)	-	-	-	-
	Other	-	-	-	-
Total Program Services		-	-	-	37,542,554
	Management and General	-	-	-	8,442,962
	Fundraising	-	-	-	-
Total Expenses - GRAPHS 2, 3 & 4		-	-	-	45,985,516
Surplus / (Deficit) From School Operations		-	-	-	(1,345,679)
Support and Other Revenue					
	Contributions	-	-	-	270,652
	Fundraising	-	-	-	-
	Miscellaneous Income	-	-	-	51,690
	Net assets released from restriction	-	-	-	-
Total Support and Other Revenue		-	-	-	322,342
Total Unrestricted Revenue		-	-	-	44,962,179
Total Temporarily Restricted Revenue		-	-	-	-
Total Revenue - GRAPHS 2 & 3		-	-	-	44,962,179
Change in Net Assets		-	-	-	(1,023,337)
Net Assets - Beginning of Year - GRAPH 2		-	-	-	21,172,839
	Prior Year Adjustment(s)	-	-	-	-
Net Assets - End of Year - GRAPH 2		-	-	-	20,149,502

APPENDIX: FISCAL DASHBOARD



Success Academy Charter Schools - NYC (Merged)

SCHOOL INFORMATION - (Continued)

Functional Expense Breakdown

	2009-10	2010-11	2011-12	2012-13	2013-14
Personnel Service	-	-	-	-	-
Administrative Staff Personnel	-	-	-	-	-
Instructional Personnel	-	-	-	-	-
Non-Instructional Personnel	-	-	-	-	-
Personnel Services (Combined)	-	-	-	23,085,127	32,608,159
Total Salaries and Staff	-	-	-	23,085,127	32,608,159
Fringe Benefits & Payroll Taxes	-	-	-	5,314,524	6,789,542
Retirement	-	-	-	-	-
Management Company Fees	-	-	-	5,632,591	8,389,463
Building and Land Rent / Lease	-	-	-	-	-
Staff Development	-	-	-	612,312	1,277,601
Professional Fees, Consultant & Purchased Services	-	-	-	161,247	536,383
Marketing / Recruitment	-	-	-	2,060,051	1,858,928
Student Supplies, Materials & Services	-	-	-	3,180,756	5,816,891
Depreciation	-	-	-	1,753,768	3,247,644
Other	-	-	-	4,185,140	7,359,695
Total Expenses	-	-	-	45,985,516	67,884,306

SCHOOL ANALYSIS

ENROLLMENT

	2009-10	2010-11	2011-12	2012-13	2013-14
Chartered Enroll	-	-	-	2,217	4,575
Revised Enroll	-	-	-	-	476
Actual Enroll - GRAPH 4	-	-	-	1,830	3,157
Chartered Grades	-	-	-	-	-
Revised Grades	-	-	-	-	-

Primary School District: New York City

Per Pupil Funding (Weighted Avg of All Districts)	-	-	-	13,527	13,527
Increase over prior year	0.0%	0.0%	0.0%	0.0%	0.0%

PER STUDENT BREAKDOWN

Revenue	Operating	-	-	-	24,393	20,471	22,432
	Other Revenue and Support	-	-	-	176	372	274
	TOTAL - GRAPH 3	-	-	-	24,569	20,843	22,706
Expenses	Program Services	-	-	-	20,515	17,146	18,831
	Management and General, Fundraising	-	-	-	4,614	4,357	4,485
	TOTAL - GRAPH 3	-	-	-	25,129	21,503	23,316
	% of Program Services	0.0%	0.0%	0.0%	81.6%	79.7%	80.7%
	% of Management and Other	0.0%	0.0%	0.0%	18.4%	20.3%	19.3%
	% of Revenue Exceeding Expenses - GRAPH 5	0.0%	0.0%	0.0%	-2.2%	-3.1%	-2.6%
Student to Faculty Ratio							
	-	-	-	-	-	-	-
Faculty to Admin Ratio							
	-	-	-	-	-	-	-
Financial Responsibility Composite Scores - GRAPH 6							
	Score	0.0	0.0	0.0	2.5	2.3	2.4
	Fiscally Strong 1.5 - 3.0 / Fiscally Adequate 1.0 - 1.4 / Fiscally Needs Monitoring < 1.0	N/A	N/A	N/A	Fiscally Strong	Fiscally Strong	Fiscally Strong
Working Capital - GRAPH 7							
	Net Working Capital	0	0	0	6,091,397	7,377,373	6,734,385
	As % of Unrestricted Revenue	0.0%	0.0%	0.0%	13.5%	11.3%	12.4%
	Working Capital (Current) Ratio Score	0.0	0.0	0.0	3.5	2.8	3.2
	Risk (Low > 3.0 / Medium 1.4 - 2.9 / High < 1.4)	N/A	N/A	N/A	LOW	MEDIUM	LOW
	Rating (Excellent > 3.0 / Good 1.4 - 2.9 / Poor < 1.4)	N/A	N/A	N/A	Excellent	Good	Excellent
Quick (Acid Test) Ratio							
	Score	0.0	0.0	0.0	2.8	2.1	2.5
	Risk (Low > 2.5 / Medium 1.0 - 2.4 / High < 1.0)	N/A	N/A	N/A	LOW	MEDIUM	LOW
	Rating (Excellent > 2.5 / Good 1.0 - 2.4 / Poor < 1.0)	N/A	N/A	N/A	Excellent	Good	Excellent
Debt to Asset Ratio - GRAPH 7							
	Score	0.0	0.0	0.0	0.2	0.3	0.2
	Risk (Low < 0.50 / Medium 0.51 - .95 / High > 1.0)	N/A	N/A	N/A	LOW	LOW	LOW
	Rating (Excellent < 0.50 / Good 0.51 - .95 / Poor > 1.0)	N/A	N/A	N/A	Excellent	Excellent	Excellent
Months of Cash - GRAPH 8							
	Score	0.0	0.0	0.0	1.3	1.0	1.1
	Risk (Low > 3 mo. / Medium 1 - 3 mo. / High < 1 mo.)	N/A	N/A	N/A	MEDIUM	MEDIUM	MEDIUM
	Rating (Excellent > 3 mo. / Good 1 - 3 mo. / Poor < 1 mo.)	N/A	N/A	N/A	Good	Good	Good

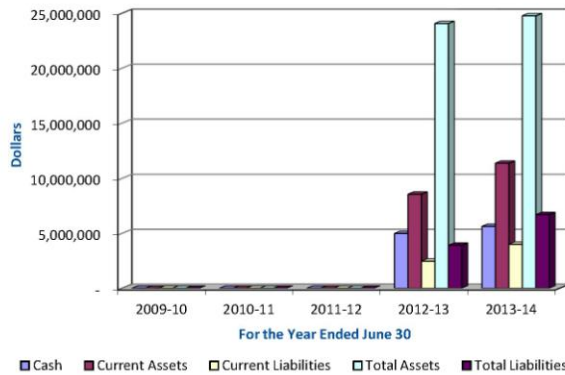
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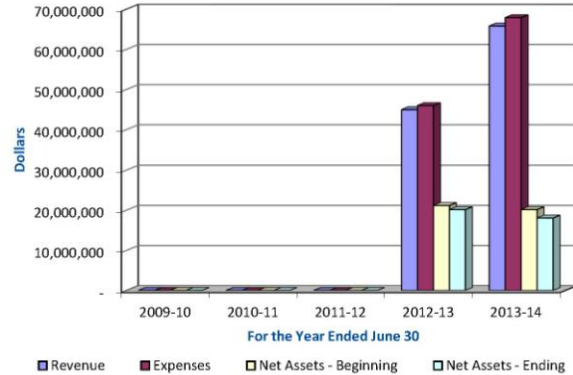
Success Academy Charter Schools - NYC (Merged)

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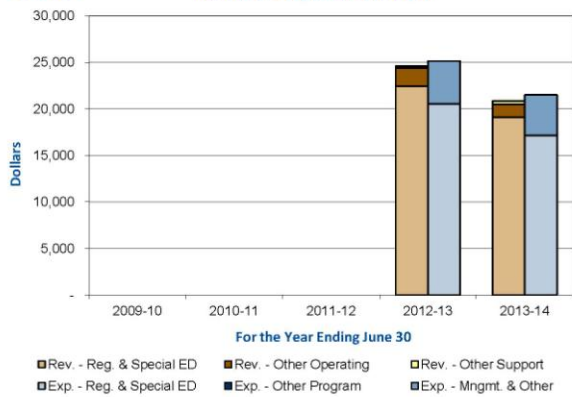
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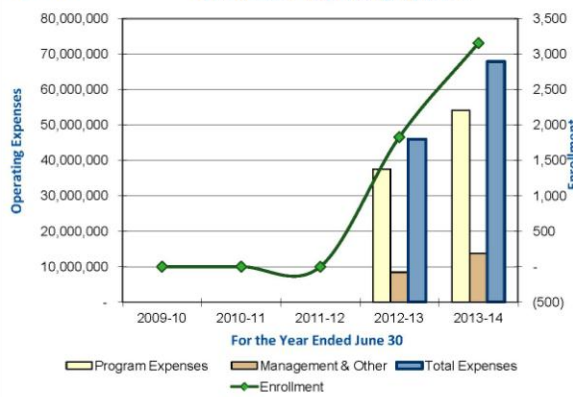
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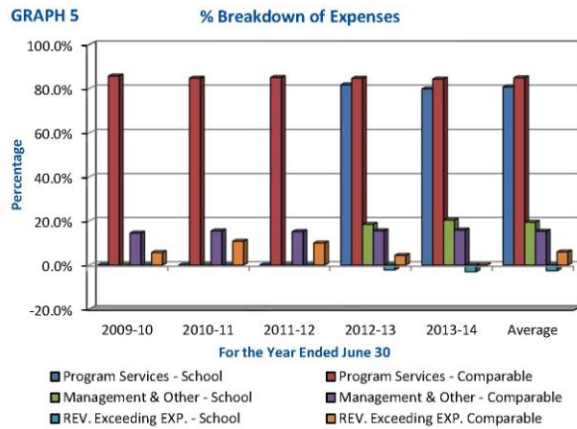
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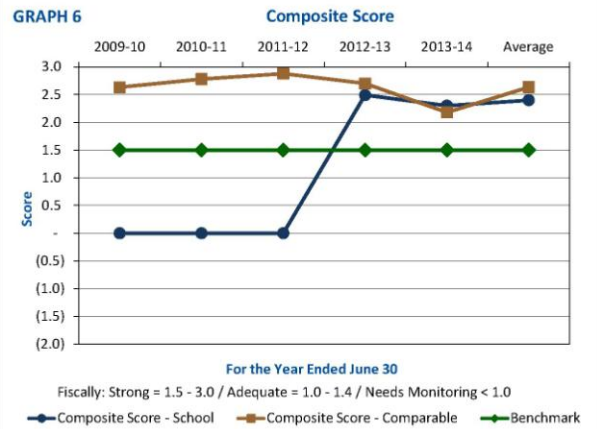
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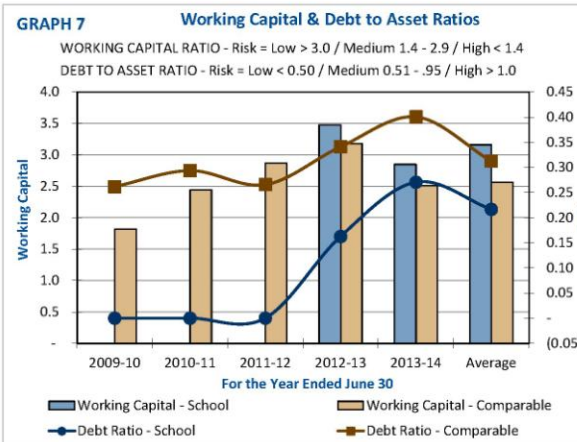
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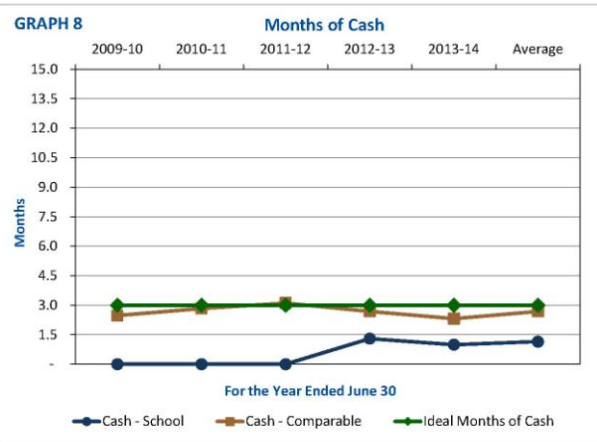
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APPENDIX: PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: English Language Arts Success Academy Charter School - Harlem 5



	2011-12 Grades Served: K-2			MET	2012-13 Grades Served: K-3			MET	2013-14 Grades Served: K-4			MET	
	Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)		
ABSOLUTE MEASURES 1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.	3	(0)	(0)		3	63.8 (80)	63.3 (79)		3	64.1 (92)	64.1 (92)		
	4	(0)	(0)		4	(0)	(0)		4	72.6 (73)	72.2 (72)		
	5	(0)	(0)		5	(0)	(0)		5	(0)	(0)		
	6	(0)	(0)		6	(0)	(0)		6	(0)	(0)		
	7	(0)	(0)		7	(0)	(0)		7	(0)	(0)		
	8	(0)	(0)		8	(0)	(0)		8	(0)	(0)		
	All	(0)	(0)		All	63.8 (80)	63.3 (79)	NA	All	67.9 (165)	67.7 (164)	NA	
2. Each year the school's aggregate Performance Level Index on the State exam will meet the Annual Measurable Objective set forth in the State's NCLB accountability system.	Grades	PI	AMO		Grades	PLI	AMO		Grades	PI	AMO		
					3	161			3-4	164	89	NA	
COMPARATIVE MEASURES 3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Comparison:				Comparison: Manhattan District 5				Comparison: Manhattan District 5				
	Grades	School	District		Grades	School	District		Grades	School	District		
				NA	3	63.3	13.4	YES	3-4	67.7	15.0	YES	
4. Each year the school will exceed its predicted percent of students at proficiency on the state exam by at least a small Effect Size (at least 0.3) based on its percentage of Economically Disadvantaged students.	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	
					80.0	63.8	21.8	3.14	YES	88.2	67.9	20.7	3.49
GROWTH MEASURE 5. Each year, the school's unadjusted mean growth percentile will meet or exceed the state's unadjusted median growth percentile.	Grades	School	State		Grades	School	State		Grades	School	State		
	4				4				4	53.8			
	5				5				5	0.0			
	6				6				6	0.0			
	7				7				7	0.0			
	8				8				8	0.0			
	All		50.0		All				All	53.8	50.0		YES

APPENDIX: PERFORMANCE SUMMARIES

SCHOOL PERFORMANCE SUMMARY: Mathematics

Success Academy Charter School - Harlem 5



	2011-12 Grades Served:			MET	2012-13 Grades Served: K-3			MET	2013-14 Grades Served: K-4			MET
	Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)		Grades	All Students % (N)	2+ Years Students % (N)	
ABSOLUTE MEASURES 1. Each year 75 percent of students who are enrolled in at least their second year will perform at proficiency on the New York State exam.	3	(0)	(0)		3	87.5 (80)	87.3 (79)		3	96.7 (92)	96.7 (92)	
	4	(0)	(0)		4	(0)	(0)		4	94.5 (73)	94.4 (72)	
	5	(0)	(0)		5	(0)	(0)		5	(0)	(0)	
	6	(0)	(0)		6	(0)	(0)		6	(0)	(0)	
	7	(0)	(0)		7	(0)	(0)		7	(0)	(0)	
	8	(0)	(0)		8	(0)	(0)		8	(0)	(0)	
	All	(0)	(0)		All	87.5 (80)	87.3 (79)	NA	All	95.8 (165)	95.7 (164)	NA
2. Each year the school's aggregate Performance Level Index on the State exam will meet the Annual Measurable Objective set forth in the State's NCLB accountability system.	Grades	PI	AMO		Grades	PLI	AMO		Grades	PI	AMO	
					3	186			3-4	196	86	NA
COMPARATIVE MEASURES 3. Each year the percent of students enrolled in at least their second year and performing at proficiency will be greater than that of students in the same grades in the local district.	Comparison:				Comparison: Manhattan District 5				Comparison: Manhattan District 5			
	Grades	School	District		Grades	School	District		Grades	School	District	
				NA		3	87.3	16.1	YES	3-4	95.7	17.5
4. Each year the school will exceed its predicted percent of students at proficiency on the State exam by at least a small Effect Size (at least 0.3) based on its percentage of Economically Disadvantaged students.	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size	% ED	Actual	Predicted	Effect Size
	80.0	87.5	25.2	3.55	YES	88.2	95.8	28.9	3.65	YES		
GROWTH MEASURE 5. Each year, the school's unadjusted mean growth percentile will meet or exceed the state's unadjusted median growth percentile.	Grades	School	State		Grades	School	State		Grades	School	State	
	4				4				4	69.6		
	5				5				5	0.0		
	6				6				6	0.0		
	7				7				7	0.0		
	8				8				8	0.0		
	All				All				All	69.6	50.0	YES

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