

THE SUNY CHARTER SCHOOLS INSTITUTE

SCHOOL EVALUATION REPORT
**MERRICK ACADEMY - QUEENS
PUBLIC CHARTER SCHOOL**

VISIT DATE: APRIL 4-5, 2023

REPORT DATE: JUNE 12, 2023

SUNY Charter Schools Institute

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Charter Schools Institute
The State University of New York

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INTRODUCTION

INTRODUCTION

This School Evaluation Report offers an analysis of evidence collected during the school visit to Merrick Academy - Queens Public Charter School (“Merrick”) on April 4 – 5, 2023. While the SUNY Charter Schools Institute (the “Institute”) conducts a comprehensive review of evidence related to all the State University of New York Charter Renewal Benchmarks (the “SUNY Renewal Benchmarks”) near the end of a charter term, most mid-cycle charter school evaluation visits focus on a subset of these benchmarks addressing the academic success of the charter and the effectiveness and viability of the charter school organization. It provides a framework for examining the quality of the educational program, focusing on teaching and learning (e.g., curriculum, instruction, assessment, and services for at-risk students), as well as leadership, organizational capacity, and board oversight. The Institute uses the established criteria on a regular basis to provide schools with a consistent set of expectations leading up to renewal.

Appendix A to the report contains a Charter Overview with descriptive and historical information about the school, as well as background information on the conduct of the visit. Together this information puts the visit in the context of the school’s current charter cycle. Appendix B provides the SUNY Renewal Benchmarks.

This report does not contain an overall statement that would specify the school’s prospects for renewal. Rather, it serves as a summary of the school’s program based on a subset of the SUNY Renewal Benchmarks. The Institute intends this selection of information to be an exception report in order to highlight areas of concern. As such, limited detail about positive elements of the educational program does not indicate the Institute does not recognize the program’s overall effectiveness.





CHARTER BACKGROUND

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

136-25 218th St, Queens, NY 11413 | Grades: K-5 | NYC Community School District 29

The State University of New York Board of Trustees (the “SUNY Trustees”) approved the original charter for Merrick on January 25, 2000. The charter opened in fall 2000, serving 125 students in Kindergarten – 2nd grade.

“ MISSION

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

CURRENT CHARTER

Serves: Kindergarten – 5th
Chartered Enrollment:
530
Charter Expiration:
June 30, 2025

KEY DESIGN ELEMENTS

Inquiry of equity;	+
Critical thinking and inquiry based pedagogy;	+
Literacy drives student agency;	+
Inquiry driven pedagogical cycles;	+
Inquiry stance of leadership; and,	+
A supportive community for all learners and families.	+

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

This year and in contrast to previous years, Merrick's board, leaders, and teachers completely align on the school's five priority areas: increasing overall academic performance; improving the program model to meet the criteria for International Baccalaureate ("IB") accreditation; supporting student and family mental health and well being; redefining the school's adult culture in alignment with its support for students and families; and, expanding the program to serve 6th – 8th grade.

Since its most recent renewal in spring 2020 and following the interruption to in-person instruction caused by the COVID-19 pandemic, Merrick has implemented structural changes to its educational program to better meet its mission and its five stated priorities. Prior to the start of the 2022-23 school year, the board named a new executive director who has previous experience as the executive director at Merrick. The board also approved adding director roles in its special education, mathematics, ELA, and science departments to increase the level of content area expertise within the instructional leadership team. The school has also hired a full time data analyst to track the school's progress against success metrics and growth targets throughout the year. To continue its mission of providing student centered instruction in a location with limited educational options, Merrick has begun to establish inquiry and project based learning principles in each grade to prepare for the adoption of International Baccalaureate curriculum schoolwide.

In 2021-22, Merrick came close to meeting its Accountability Plan goal for mathematics, but it did not meet the ELA target for any of the three available measures under its goal with only 38% of the school's students enrolled in at least their second year scoring at or above proficiency. Despite mixed performance on the state's ELA and mathematics exams in 2021-22, the school is demonstrating high rates of academic growth during 2022-23. Merrick's overall growth on the nationally normed i-Ready assessments show the school is on track to post higher proficiency this year. Although a performance gap persists between the school's students with disabilities and its students without disabilities, i-Ready data also indicate the academic performance of Merrick Academy's students with disabilities is growing as quickly or faster than its students without disabilities, effectively closing the performance gap between these two student groups. Merrick is due for its renewal site visit in fall of 2024 and must improve its ELA performance from these baseline scores in order to make the best case for earning a full term renewal.

ACADEMIC PERFORMANCE

2021-22 CHARTER PERFORMANCE REVIEW

At the beginning of the Accountability Period,¹ 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. Throughout the charter term, the Institute examines results for five required Accountability Plan measures on an annual basis and provides an Accountability Dossier to each school detailing the school's progress toward meeting its Accountability Plan goals. Because the Act requires charters be held "accountable for meeting measurable student achievement results"² and states the educational programs at a charter school must "meet or exceed the student performance standards adopted by the board of regents"³ for other public schools, SUNY's required accountability measures rest on performance as measured by statewide assessments. More information about the required Accountability Plan measures can be found on the [Institute's website](#).

In 2021-22, the first year with results suitable for analysis following the cancellation of state exams in 2019-20, Merrick did not meet its key academic Accountability Plan goal in ELA. The charter came close to meeting its mathematics goal. During the evaluation visit, Merrick presented evidence of high academic growth in both ELA and mathematics based on the nationally normed i-Ready assessment which indicated the school is on track to post higher proficiency rates in 2022-23 in both subjects.

In 2021-22, Merrick did not meet its ELA goal. The school did not meet the target for any of the three available measures under its goal. With only 38% of the school's students enrolled in at least their second year scoring at or above proficiency, the charter performed 37 percentage points below the absolute target of 75% and three percentage points below the district results. Merrick posted an ELA effect size of -0.18 according to the Institute's comparative performance analysis. This level of performance is far below the target of 0.3 and indicates the school performed lower than expected compared to schools across the state enrolling similar percentages of economically disadvantaged students.

In mathematics, Merrick came close to meeting its Accountability Plan goal in 2021-22. That year, 45% of students enrolled in at least their second year scored at or above proficiency on the state's 3rd- 5th grade mathematics exam. Although this proficiency rate fell under the absolute target of 75%, the school's performance exceeded the district results from the same grades by eight percentage points. Merrick's effect size of 0.18 came close to the target of 0.30. In comparison to demographically similar schools across the state, Merrick performed slightly higher than expected according to the Institute's effect size analysis.

1. 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. In the case of initial renewal, the Accountability Period covers the first four years of the charter term.

2. Education Law § 2850(2)(f).

3. Education Law § 2854(1)(d).

ACADEMIC PERFORMANCE

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL

ENGLISH LANGUAGE ARTS ACCOUNTABILITY PLAN GOAL

District Comparison. The percentage of students at **the charter** performing at or above proficiency in ELA compared to the district.

100

Target: 75

50

0

Test Year	Comp Grades	District %	Charter %
2018	3-5	43	45
2019	3-5	45	48
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-5	41	38

Effect Size. The chart shows charter's effect size above its predicted level of performance in **ELA** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.

2

1

0

Target: 0.3

Test Year	Test Grades	Effect Size
2018	3-5	0.13
2019	3-5	0.36
2020	N/A	N/A
2021	N/A	N/A
2022	3-5	-0.18

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

60

Target: 50

40

Test Year	Charter Mean Growth
2018	52.8
2019	47.8
2020	N/A
2021	N/A
2022	N/A

MATHEMATICS ACCOUNTABILITY PLAN GOAL

District Comparison. The percentage of students at **the charter** performing at or above proficiency in mathematics compared to the district.

100

Target: 75

50

0

Test Year	Comp Grades	District %	Charter %
2018	3-5	38	39
2019	3-5	41	50
2020	N/A	N/A	N/A
2021	N/A	N/A	N/A
2022	3-5	37	45

Effect Size. The chart shows charter's effect size above its predicted level of performance in **mathematics** according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.

2

1

0

Target: 0.3

Test Year	Test Grades	Effect Size
2018	3-5	-0.34
2019	3-5	0.24
2020	N/A	N/A
2021	N/A	N/A
2022	3-5	0.18

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

60

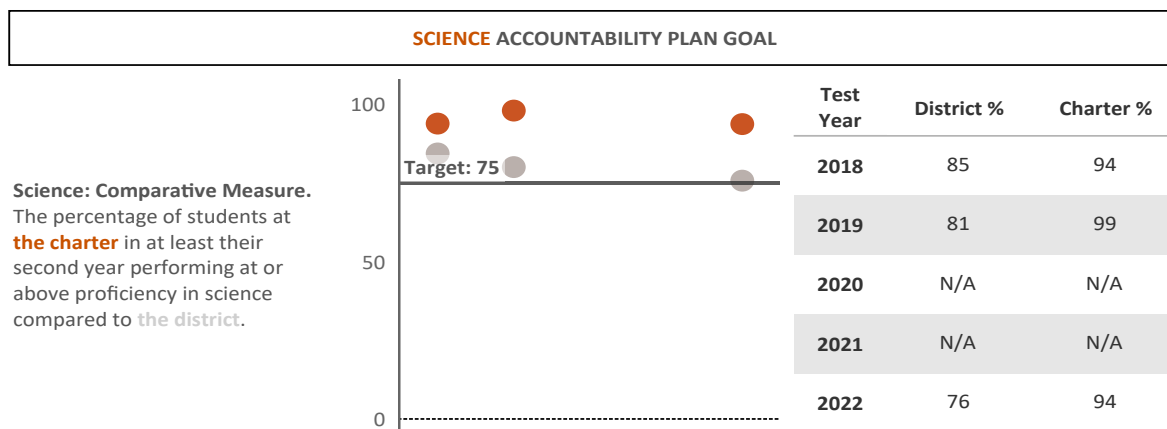
Target: 50

40

Test Year	Charter Mean Growth
2018	56.4
2019	61.6
2020	N/A
2021	N/A
2022	N/A

ACADEMIC PERFORMANCE

MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL



SPECIAL POPULATIONS PERFORMANCE*			
	2018	2019	2022
Students with Disabilities Enrollment	115	107	100
Tested on State Exam	51	51	33
Charter Percent Proficient on ELA Exam	19.6	21.6	12.1
District Percent Proficient	12.4	15.0	11.1
ELL Enrollment	17	9	21
Tested on NYSESLAT Exam	13	9	20
Charter Percent 'Commanding' or Making Progress	38.5	44.4	40.0

* The academic outcome data about the performance of students receiving special education services and English language learners ("ELLs") above is not tied to separate goals in the charter 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".

BENCHMARK SUMMARY

QUALITATIVE BENCHMARK ANALYSIS

The SUNY Renewal Benchmarks, grounded in the body of research from the Center for Urban Studies at Harvard University,⁴ describe the elements in place at schools that are highly effective at providing students from low-income backgrounds the instruction, content, knowledge, and skills necessary to produce strong academic performance. The SUNY Renewal Benchmarks, found in Appendix B, describe the elements an effective charter school must have in place at the time of renewal.⁵

ASSESSMENT

Merrick administers various assessments to track student progress schoolwide, and staff members use assessment results to determine instructional priorities for general education and special education students. However, as the school continues to expand its curricular programs and add new programming, there is an opportunity to refine the analysis of assessment data to further inform continuous improvement efforts.

Merrick administers i-Ready and Achievement Network (“ANet”) interim assessments each trimester to drive instruction. The principal uses i-Ready results to determine instructional priorities for teachers, and teachers use the platform to determine student lexile levels, identify struggling students, and select content to reteach. The charter also administers the ANet assessments due to their close alignment to the school’s curriculum, and teachers use the results to group students for differentiated instruction along with other forms of assessment such as exit tickets and checks for understanding during instruction. The charter uses the IXL assessment to track academic progress for students receiving academic intervention services (“AIS”).

This year, Merrick hired a data analyst to track schoolwide performance trends and create interactive dashboards to review during biweekly leadership meetings. During these meetings, instructional leaders analyze student performance by subgroup to monitor the effectiveness of academic interventions. Leaders also conduct predictive analyses and track schoolwide growth on interim assessments between trimesters. These new, targeted analysis efforts are proving effective. The school notes high rates of growth on the i-Ready assessment in both ELA and mathematics overall during 2022-23. Merrick also shows evidence of closing the performance gap between its students with disabilities and students without disabilities where the performance of student with disabilities is growing faster than that of students without disabilities.

During the evaluation visit, the Institute noted that Merrick has the opportunity to develop additional data analysis routines to support its efforts toward renewal. For example, the charter does not have current plans to conduct item analyses of state test data despite the need to improve ELA performance as part of its Accountability Plan. Similarly, the charter does not currently analyze interim assessment data by classroom

4. An extensive body of research, including a [report from Harvard](#) and a [report from the United States General Accounting Office](#), identifying and confirming the correlates of effective schools exists dating back four decades.

5. Additional details regarding the SUNY Renewal Benchmarks are available on the [Institute’s website](#).

BENCHMARK SUMMARY

despite significant differences in 2021-22 state test performance by grade, and it is not clear how student performance data factors into formal teacher evaluations. Lastly, given the significant changes to instructional programming that have occurred in the past two years, the charter has an opportunity to leverage assessment data to measure the impact and effectiveness of new curriculum and increased coaching.

CURRICULUM

Merrick has a comprehensive, standards aligned curricular framework that outlines student learning objectives and lesson pacing at each grade level, and staff members express high levels of satisfaction with current curricular choices, citing how the curriculum supports teachers with differentiation and student engagement. However, given the recent adoption of new curricula across subject areas, the charter has yet to leverage its data analysis capacity to gauge the impact or value-add of the new curricula on student outcomes when compared to previous curricular materials.

In the early elementary grades, teachers use Wit and Wisdom to support students with writing and a combination of Geodes and Foundations for phonics instruction in accordance with the school's science of reading approach. For mathematics, Merrick follows the Eureka curriculum and it employs Amplify for science. To assist teachers with internalizing curricular concepts, assistant principals for each content area meet with teachers two to three weeks prior to the start of a new unit to backwards plan based on learning objectives for the unit, plan differentiation and scaffolding strategies, and develop responses to potential student misconceptions. Once teachers begin a new unit, they rely on a week-at-a-glance ("WAG") document to know what to teach each day and to ensure similar pacing with teachers in their grade band. The WAG contains a link to each day's lesson plans and outlines the objectives, materials, formative assessments, criteria for success, differentiation plan, and student groupings for each lesson.

In the next few years, Merrick plans to incorporate the International Baccalaureate ("IB") curriculum schoolwide. To prepare students for this shift, it has designed its current curricula to acclimate students to inquiry and project based learning on an incremental basis. For example, in the 2022-23 school year, students complete mini research projects each quarter using pre-determined success criteria to guide their work. Students in 5th grade present projects related to personal identity, African-American athletes, and running a small business. In 4th grade, students worked collaboratively to create a survival kit for extreme circumstances, and they carried out a debate over the merits of TikTok.

PEDAGOGY

Across classrooms, Merrick teachers maintain positive classroom climates and deliver purposeful lessons aligned to the school's curriculum. In co-taught classrooms, teachers effectively leverage co-teaching models to differentiate instruction and support student time on task, and students consistently display an internalization of behavior expectations and routines. However, despite teachers' consistent adherence to learning objectives indicated by weekly pacing documents, there is considerable variation in the quality of lesson facilitation across classrooms.

BENCHMARK SUMMARY

For example, in multiple ELA lessons, the Institute observed teachers prompting students with higher order thinking questions and students responding with genuine enthusiasm for classroom discourse. Students in these classrooms also displayed a strong internalization of classroom routines and behavioral expectations. Meanwhile, in other ELA lessons, students engaged in off-task behaviors during small group instruction with many carrying on loud conversations and walking away from group work spontaneously. In mathematics, the Institute noted that while students across grade levels demonstrate a strong ability to execute computational procedures, they often struggle when asked to explain fundamental concepts that define the procedures. In such cases, teachers do not address these misconceptions effectively or provide responsive scaffolding.

INSTRUCTIONAL LEADERSHIP

Merrick has a cohesive instructional leadership team that uses common planning time and one-to-one coaching to help teachers build pedagogical skills. The school recently increased its emphasis on the use of coaching routines to foster a culture of continuous improvement in pedagogical practice.

Merrick instructional leaders use a distributive leadership model to deliver professional development for teachers. Assistant principals (“APs”) within each content area work with lead planners to plan and prepare intellectually for lessons. Lead planners then turnkey this information for grade-level teams to use during bi-weekly professional development sessions during which teachers and leaders discuss instructional approaches. This iterative practice ensures that the WAG pacing document outlines what teachers should teach along with strategies for differentiating content for students needing additional support. The principal holds teachers accountable to high performance standards by conducting formal evaluations one to two times per year. The findings from each evaluation determine the type and dosage of coaching that each teacher receives, which may include in-classroom coaching, co-planning, and modeling.

Between formal observations, APs observe instructional practice in the classroom setting and provide feedback during 30-minute, in-person debrief sessions with teachers. Following each conversation, APs document teacher growth areas via the Whetstone platform and this documentation informs teacher supervision efforts over time. Other APs also and the principal also provide written coaching feedback to teachers through Whetstone and teachers report the feedback is aligned, useful, and germane to their practice.

Teachers note that grade team meetings give them the opportunity to internalize lesson content, discuss instructional techniques, and discuss classroom management principles. Leaders and teachers align on this year’s priority to emphasize student voice in lessons by requiring students to appropriately grapple with lesson content. However, these promising practices are new to Merrick and need continued development. The Institute noted a number of mathematics lessons in which teachers had difficulty facilitating discussion when leading students through problem solving activities in large and small groups. Similarly, in some mathematics lessons, teachers lacked strategies to support students who displayed significant conceptual misunderstandings during guided practice activities.

BENCHMARK SUMMARY

AT-RISK PROGRAM

Merrick has strong systems for identifying students with disabilities, ELLs, and students struggling academically, and the school provides effective support in the areas of academic intervention and language acquisition. The academic performance of students in these subgroups grew during the first half of 2022-23 according to i-Ready results in ELA and mathematics.

Teachers at Merrick use various measures to identify students struggling academically in ELA and mathematics, including the nationally norm-referenced i-Ready assessment, ANet assessment, the adaptive, standards aligned iXL assessment, classwork, and exit tickets. Teachers and instructional leaders assign students struggling academically to a six-week AIS intervention matching the level of student need. Students with the lowest level of need receive support in the general classroom setting where teachers provide extra attention and support using small group settings and extra time on task. AIS teachers pull students assigned to intervention tiers two and three and provide them with extra instruction in foundational skills and content knowledge outside the classroom setting while differentiating the intensity of ELA and mathematics interventions based on student need.

All students at Merrick Academy participate in extra blocks of ELA and mathematics learning, called response to intervention (“RTI”) blocks, during each school day. Younger students participate in shorter intervention blocks. For example, students in the lower grades experience two separate RTI blocks while students in the upper grades continue to experience one 80-minute block of instruction in each content area.

Instruction in AIS sessions occurs on a six-week cycle and sometimes employs online resources like iXL and i-Ready. The i-Ready results from September 2022 to January 2023 demonstrate gains among students in AIS interventions with many students moving from performing two or more grade levels behind to two or less grade levels behind in both ELA and mathematics. AIS teachers provide classroom teachers with progress reports in a consistent format every three weeks to monitor goal attainment over time. This is a promising practice but the school has an opportunity to provide structured, regular collaboration time for AIS and classroom teachers that would increase communication between teachers about effective strategies and upcoming lesson content.

Teachers and instructional leaders identify students demonstrating little academic improvement through the AIS program for referral to the committee on special education (“CSE”) for a special education evaluation. School leaders intentionally selected the programs in use in the AIS program to collect information about student performance that appropriately informs each referral to the CSE about ineffective teaching and learning strategies, timelines for intervention attempts, and the associated academic outcome data. Merrick Academy also uses existing records to identify each student with an individualized education program (“IEP”) already in place. The school’s integrated co-teaching (“ICT”), special education teacher support services (“SETSS”), and 12:1:1 self-contained classrooms adequately support the needs of Merrick Academy students with disabilities.

BENCHMARK SUMMARY

Merrick Academy's English Language Learner ("ELL") coordinator leads an effective system to identify and provide language acquisition support to ELLs. Parents complete a home language survey upon enrollment, and the coordinator uses the survey results to identify families for an intake interview and administers the NYSITELL as appropriate based on interview findings. The school assigns ELLs to time in a language support setting according to commissioner's regulations part 154. Notably, while it was impossible to administer the NYSITELL during interrupted instruction caused by the COVID-19 pandemic, Merrick Academy used the RAZ Kids program to continue to identify ELLs and assign them to appropriate language acquisition supports. Merrick Academy's ELL teacher uses McGraw Hill's Wonders program to support students in Kindergarten – 2nd grade along with ELL extension activities and lessons from the Wit and Wisdom ELA curricular materials. The school has a track record of supporting ELLs to test out of language acquisition supports. Last year, eight ELLs scored at commanding on the NYSESLAT.

ORGANIZATIONAL CAPACITY

This year, Merrick identified five key priorities around which it organized its program. The school's priorities include: increasing overall academic performance; improving the program model to meet the criteria for International Baccalaureate ("IB") accreditation; supporting student and family mental health and well being; redefining the school's aduItculture in alignment with its support for students and families; and, expanding the program to serve 6th – 8th grade. The board, leaders, and teachers report alignment with these priorities and the board approved structural changes to support the organization meeting them.

Merrick Academy works effectively to deliver its educational program. The new structure of assistant principals serving as directors of content areas allows teachers to receive coaching from a school leader based on the subject that they teach. This also allows teachers to play an active role in developing each other as lead planners turnkeying lesson plans to their peers. The project-based learning and STEAM initiatives are catalysts toward interdisciplinary planning, which is pivotal as the school seeks IB Primary Years Program accreditation. Teachers reported that the structure of the charter provides for them clear lines of coaching from their APs and lesson planning support for their team leaders. The WAGs play an important role in aligning day-to-day instructional planning.

The school has allocated sufficient resources to support the achievement of goals. Teachers have the supplies needed to execute their lessons as well as clear, streamlined processes for the acquisition of supplemental resources. The operations team curates and manages a series of sheets that direct staff members to frequently requested information as well as trackers to monitor requests and processes underway. Teachers cited this budding intranet as a helpful tool in ensuring that non-instructional requests are fulfilled in a timely manner. As the school continues to mature, there is an opportunity to evolve into data management platforms that organize and store key information that the school regularly leverages. This may include student achievement data, student discipline information, operational forms, WAGs, and instructional planning tools.

BENCHMARK SUMMARY

The school maintains adequate student enrollment and has strong student attendance. To attract new families, the school uses multiple recruitment strategies, including newspaper and radio advertisements, social media, and participation in community events. Afterschool programs focus on academic skills development and for students to engage in classes focused on the arts. These play a key role in engaging current families and attracting new families to the charter. Summer programming allows students in all grades to engage in additional learning in mathematics and ELA. The summer schedule also allows for enrichment programs, foreign language skills development, and dedicated trips that align with the school's STEAM focus.

BOARD OVERSIGHT & GOVERNANCE

Merrick Academy's board provides effective oversight of the school's operations and academic program. The board is aware of operational successes and challenges and knows the extent to which the school is progressing toward meeting its Accountability Plan goals. Notably, the board's stated goals align with those of the school's leaders and teachers.

The board operates in a committee structure and its seven members possess adequate skills to ensure the school's future of academic and operational success. Presently, as the board is prioritizing a grade level revision to begin serving middle school grades, it is looking to add new members with experience in real estate and finance. Current Merrick board committees are empowered to make informed decisions as they receive regular updates from school personnel. School leaders provide the board with information aligned to a clear and consistent set of priorities including academic performance, health and wellness of students and staff members, fiscal and operational viability, readiness for the proposed grade level expansion, and progress toward IB accreditation. Importantly, the board tracks the implementation of new curricular materials and progress toward delivering a transdisciplinary model of instruction. In its oversight of the executive director, the board monitors performance related to the school's academic record, strategic decision making, enrollment status, fiscal health, and capacity to respond to community needs, but it has not completed a recent formal evaluation of the executive director based on these metrics.

The board engages with the school community in various ways, including participating in activities hosted by the Merrick Family Academy – a parent led organization. Board members also regularly visit the school during normal operation hours and attend schoolwide community events.

Merrick

Ax

APPENDICES

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SUNY RENEWAL
BENCHMARKS

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MERRICK ACADEMY - QUEENS PUBLIC CHARTER SCHOOL BOARD OF TRUSTEES¹

CHAIR

Cameil Dalgetty-Jarvis

TREASURER

James Ding

SECRETARY

Nicole C. Blair-Barzey

TRUSTEES

Gerald Karikari

Tatum T. Boothe

Paula B. James

CHARTER LEADERS

EXECUTIVE DIRECTOR

Dr. Adrian Manuel, Executive Director (2021-22 to Present)

Stephanie Mauterstock Executive Director (2020-21)

Dr. Adrian Manuel, Executive Director (January 2019 to 2019-20)

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

PRINCIPAL

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

Nicole Griffin, Interim Acting Principal (2013-14)

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

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

Melissa Muhammed, Director of Strategic Planning and Staff Development (September 2010 to November 2010)

Carolyn Thomas, Interim Acting Principal (March 2010 to August 2010)

Alma Alston, Principal (September 2000 to February 2010)

CHARTER CHARACTERISTICS

SCHOOL YEAR	CHARTERED ENROLLMENT	ACTUAL ENROLLMENT ²	ACTUAL AS A PERCENTAGE OF CHARTERED ENROLLMENT	GRADES SERVED
2018-19	475	521	110%	K-5
2019-20	475	538	113%	K-5
2020-21	530	579	109%	K-5
2021-22	530	527	99%	K-5
2022-23	530	578	109%	K-5

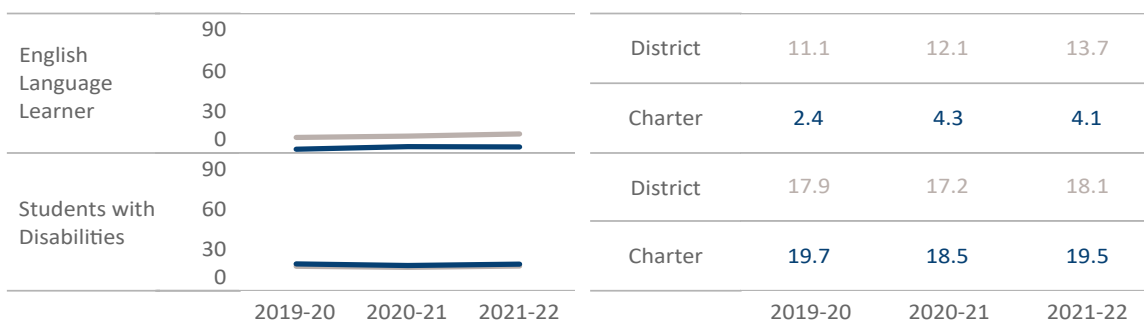
1. Source: The Institute's board records at the time of the visit.

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

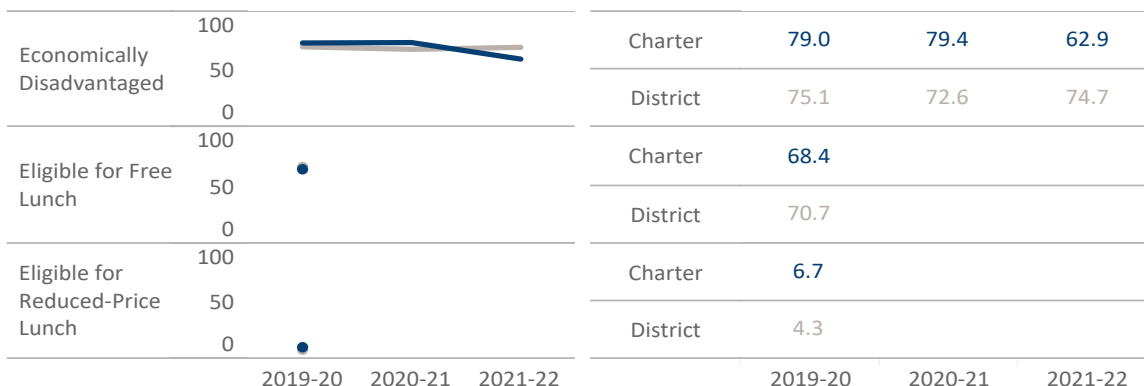
Merrick Academy - Queens Public Charter School

Queens CSD 29

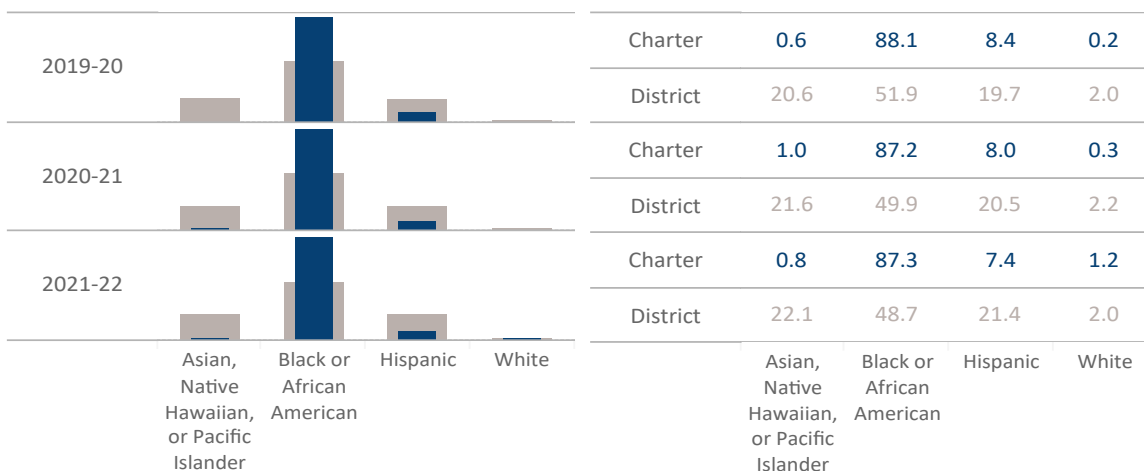
Student Demographics: Special Populations



Student Demographics: Free/Reduced Lunch



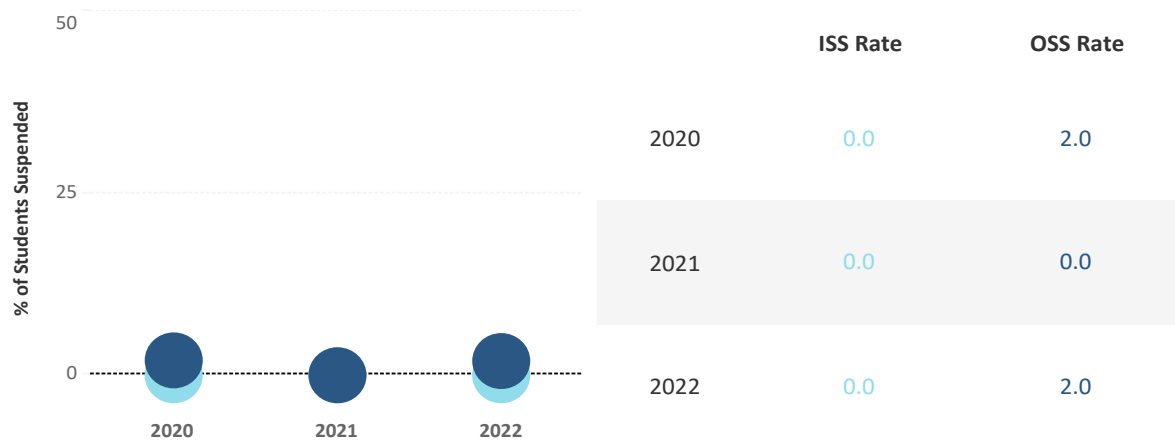
Student Demographics: Race/Ethnicity



* Data reported in these charts reflect BEDS day enrollment counts as reported by the NYSED except for the charter's 2020-21 ELL enrollment which reflects data reported by the education corporation and validated by the Institute.

Merrick Academy - Queens Public Charter School

Queens CSD 29



Data suitable for comparison are not available. The percentage rate shown here is calculated using the method employed by 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 charter each year

2020 2021 2022

0 0 0

Merrick Academy - Queens Public Charter School's Enrollment and Retention Status: 2021-22

			Target	Charter
enrollment	economically disadvantaged	<div><div></div></div>	84.5	62.9
	English language learners	<div><div></div></div>	9.2	4.1
	students with disabilities	<div><div></div></div>	14.0	19.5
retention	economically disadvantaged	<div><div></div></div>	93.6	79.3
	English language learners	<div><div></div></div>	93.8	66.7
	students with disabilities	<div><div></div></div>	93.3	84.7

* Data reported in these charts reflect information reported by the education corporation and validated by the Institute.

APPENDIX A: CHARTER SCHOOL OVERVIEW

CHARTER SCHOOL VISIT HISTORY

SCHOOL YEAR	VISIT TYPE	DATE
2000-01	First Year Visit	May 22, 2001
2001-02	Evaluation Visit	May 13, 2002
2002-03	Evaluation Visit	January 15 – 16, 2003
2003-04	Initial Renewal Visit	Spring 2004
2006-07	Evaluation Visit	May 24, 2007
2007-08	Evaluation Visit	May 13 – 14, 2008
2009-10	Subsequent Renewal Visit	November 6, 2009
2011-12	Evaluation Visit	February 15 – 16, 2012
2014-15	Subsequent Renewal Visit	November 13, 2014
2015-16	Evaluation Visit	March 22 and June 1, 2016
2017-18	Evaluation Visit	April 18 – 19, 2018
2018-19	Evaluation Visit	April 9 – 10, 2019
2019-20	Subsequent Renewal Visit	October 16 – 17, 2019
2022-23	Evaluation Visit	April 4 – 5, 2023

CONDUCT OF THE VISIT

DATE(S) OF REVIEW	EVALUATION TEAM MEMBERS	TITLE
April 4 – 5, 2023	Ciani Jones	Senior Analyst
	Jeff Wasbes	Executive Deputy Director for Accountability
	Carl-Anthony Watson	External Consultant

CHARTER CYCLE CONTEXT

CHARTER TERM	ACCOUNTABILITY PERIOD	ANTICIPATED RENEWAL VISIT
Fourth	Third Year of Five-Year Accountability Period	Fall 2024



VERSION 5.0, MAY 2012

INTRODUCTION

The State University of New York Charter Renewal Benchmarks¹ (the “SUNY Renewal Benchmarks”) serve two primary functions at renewal:

- They provide a framework for the Charter Schools Institute (the “Institute”) to gather and evaluate evidence to determine whether a school has made an adequate case for renewal. In turn, this evidence assists the Institute in deciding if it can make the required legal and other findings in order to reach a positive recommendation for renewal. For example, the various benchmarks that the Institute uses to determine whether the school has had fiscally responsible practices in place during the last charter period allow the Institute to determine with greater precision whether the school will operate in a fiscally sound manner during the next charter period, a finding that the New York Charter Schools Act requires the SUNY Trustees to make.
- At the same time that the SUNY Renewal Benchmarks provide a framework for the Institute to collect and review evidence, they also provide the school with a guide to understanding the Institute’s evaluative criteria. As the Institute uses the SUNY Renewal Benchmarks (or some sub-set of them) as the framework for conducting its ongoing school evaluation visits, school leaders should be fully aware of the content of the Benchmarks at the time of renewal.

The SUNY Renewal Benchmarks are organized into four inter-connected renewal questions that each school must answer when submitting a renewal application. The benchmarks further reflect the interwoven nature of schools from an academic, organizational, fiscal and/or legal perspective. For example, the Institute could reasonably place many of the academic benchmarks under the heading of organizational effectiveness. More generally, some redundancy exists because the Institute looks at the same issue from different perspectives.

Precisely how the Institute uses the SUNY Renewal Benchmarks, during both the renewal process and throughout the charter period, is explained in greater detail in the Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University of New York (the “SUNY Renewal Practices”), available on the Institute’s website at: <http://www.newyorkcharters.org/renewal/>. Responses to frequently asked questions about the Institute’s use of the SUNY Renewal Benchmarks appear below:

- The Institute does not have a point system for recommending renewal. A school cannot simply tally up the number of positive benchmark statements in order to determine the Institute’s recommendation
 - Some benchmarks are weighed more heavily than others. In particular, the Institute gives the greatest weight to how well the school has met its academic Accountability Plan goals.

1. Research on public school reform, known as the effective schools movement, has embraced the premise that, given certain organizing and cultural characteristics, schools can teach all children the intended curriculum and hold them to high academic standards. Over the decades, the accumulated research into effective schools has yielded a set of common characteristics that all effective schools share. These characteristics are so consistently prevalent among successful schools that they have come to be known as the Correlates of Effective Schools. The Renewal Benchmarks adapt and elaborate on these correlates.

- Despite the fact that the Accountability Plan comprises only a single benchmark, a school’s performance on that benchmark is critical. In fact, it is so important that while the Institute may recommend non-renewal for fiscal and organizational failures (if sufficiently serious), excellence in these areas will not excuse poor academic performance.
- The Institute does not use every benchmark during every kind of renewal review, and how the benchmarks are used differs depending on a school’s circumstances. For example, the Qualitative Education Benchmarks (Benchmarks 1B-1F, 2C and 2D) are given far less weight in making a renewal decision on schools that the Institute has previously renewed. Similarly, less weight is accorded to these benchmarks during an initial renewal review where a school has consistently met its academic Accountability Plan goals.
 - The Institute also may not consider every indicator subsumed under a benchmark when determining if a school has met that benchmark, given the school’s stage of development or its previous track record.
- Aside from Benchmark 1A on academic Accountability Plan goals (which is singular in its importance), no school should fear that a failure to meet every element of every benchmark means that it is not in a position to make a case for renewal. To the contrary, the Institute has yet to see a school that performs perfectly in every respect. The Institute appreciates that the benchmarks set a very high standard collectively. While the Institute certainly hopes and expects that schools aim high, it is understood that a school’s reach will necessarily exceed its grasp in at least some aspects.

In this fifth edition of the SUNY Renewal Benchmarks, the Institute has made some revisions to the Qualitative Educational Benchmarks, namely those benchmarks used for ongoing school evaluation visits, to streamline the collection of evidence. For example, the Institute has incorporated Student Order and Discipline into Pedagogy, and Professional Development into Instructional Leadership. The Institute has rewritten some of the overarching benchmark statements to capture the most salient aspects of school effectiveness, organizational viability, legal compliance, and fiscal soundness. Some of the bulleted indicators within benchmarks have been recast or eliminated. Finally, the Institute has added some indicators to align the benchmarks with changes in the Charter Schools Act (e.g., provisions in meeting enrollment and retention targets when assigned and abiding by the General Municipal Law).

It is important that the entire school community understand the renewal process. All members of a school’s leadership team and board should carefully review both the SUNY Renewal Benchmarks and the SUNY Renewal Practices. Note that a renewal overview document for parents, teacher and community members is also available on the Institute’s website at: <http://www.newyorkcharters.org/renewal/>. Please do not hesitate to contact the Institute with any questions.



RENEWAL QUESTION 1 IS THE SCHOOL AN ACADEMIC SUCCESS?

1A – ACADEMIC ACCOUNTABILITY PLAN GOALS

OVER THE ACCOUNTABILITY PERIOD, THE SCHOOL HAS MET OR COME CLOSE TO MEETING ITS ACADEMIC ACCOUNTABILITY PLAN GOALS.

The Institute determines the extent to which the school has met the Accountability Plan goals in the following areas:

- English language arts;
- mathematics;
- science;
- social studies (high school only);
- NCLB;
- high school graduation and college preparation (if applicable); and
- optional academic goals included by the school.

1B – USE OF ASSESSMENT DATA

THE SCHOOL HAS AN ASSESSMENT SYSTEM THAT IMPROVES INSTRUCTIONAL EFFECTIVENESS AND STUDENT LEARNING.

The following elements are generally present:

- the school regularly administers valid and reliable assessments aligned to the school's curriculum and state performance standards;
- the school has a valid and reliable process for scoring and analyzing assessments;
- the school makes assessment data accessible to teachers, school leaders and board members;
- teachers use assessment results to meet students' needs by adjusting classroom instruction, grouping students and/or identifying students for special intervention;
- school leaders use assessment results to evaluate teacher effectiveness and to develop professional development and coaching strategies; and
- the school regularly communicates to parents/guardians about their students' progress and growth.

1C – CURRICULUM

THE SCHOOL'S CURRICULUM SUPPORTS TEACHERS IN THEIR INSTRUCTIONAL PLANNING.

The following elements are generally present:

- the school has a curriculum framework with student performance expectations that provides a fixed, underlying structure, aligned to state standards and across grades;

- in addition to the framework, the school has supporting tools (i.e., curriculum maps or scope and sequence documents) that provide a bridge between the curriculum framework and lesson plans;
- teachers know what to teach and when to teach it based on these documents;
- the school has a process for selecting, developing and reviewing its curriculum documents and its resources for delivering the curriculum; and
- teachers plan purposeful and focused lessons.

1D – PEDAGOGY

HIGH QUALITY INSTRUCTION IS EVIDENT THROUGHOUT THE SCHOOL.

The following elements are generally present:

- teachers deliver purposeful lessons with clear objectives aligned to the school’s curriculum;
- teachers regularly and effectively use techniques to check for student understanding;
- teachers include opportunities in their lessons to challenge students with questions and activities that develop depth of understanding and higher-order thinking and problem solving skills;
- teachers maximize learning time (e.g., appropriate pacing, on-task student behavior, clear lesson focus and clear directions to students); transitions are efficient; and
- teachers have effective classroom management techniques and routines that create a consistent focus on academic achievement.

1E – INSTRUCTIONAL LEADERSHIP

THE SCHOOL HAS STRONG INSTRUCTIONAL LEADERSHIP.

The following elements are generally present:

- the school’s leadership establishes an environment of high expectations for teacher performance (in content knowledge and pedagogical skills) and in which teachers believe that all students can succeed;
- the instructional leadership is adequate to support the development of the teaching staff;
- instructional leaders provide sustained, systemic and effective coaching and supervision that improves teachers’ instructional effectiveness;
- instructional leaders provide opportunities and guidance for teachers to plan curriculum and instruction within and across grade levels;
- instructional leaders implement a comprehensive professional development program that develops the competencies and skills of all teachers;
- professional development activities are interrelated with classroom practice;
- instructional leaders regularly conduct teacher evaluations with clear criteria that accurately identify teachers’ strengths and weaknesses; and
- instructional leaders hold teachers accountable for quality instruction and student achievement.



1F – AT-RISK STUDENTS

THE SCHOOL MEETS THE EDUCATIONAL NEEDS OF AT-RISK STUDENTS.

The following elements are generally present:

- the school uses clear procedures for identifying at-risk students including students with disabilities, English language learners and those struggling academically;
 - the school has adequate intervention programs to meet the needs of at-risk students;
 - general education teachers, as well as specialists, utilize effective strategies to support students within the general education program;
 - the school adequately monitors the progress and success of at-risk students;
 - teachers are aware of their students' progress toward meeting IEP goals, achieving English proficiency or school-based goals for struggling students;
 - the school provides adequate training and professional development to identify at-risk students and to help teachers meet students' needs; and
 - the school provides opportunities for coordination between classroom teachers and at-risk program staff including the school nurse, if applicable.
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RENEWAL QUESTION 2

IS THE SCHOOL AN EFFECTIVE, VIABLE ORGANIZATION?

2A – MISSION & KEY DESIGN ELEMENTS

THE SCHOOL IS FAITHFUL TO ITS MISSION AND HAS IMPLEMENTED THE KEY DESIGN ELEMENTS INCLUDED IN ITS CHARTER.

The following elements are generally present:

- the school faithfully follows its mission; and
- the school has implemented its key design elements.

2B – PARENTS & STUDENTS

PARENTS/GUARDIANS AND STUDENTS ARE SATISFIED WITH THE SCHOOL.

The following elements are generally present:

- the school regularly communicates each child's academic performance results to families;
- families are satisfied with the school; and
- parents keep their children enrolled year-to-year.

2C – ORGANIZATIONAL CAPACITY

THE SCHOOL ORGANIZATION EFFECTIVELY SUPPORTS THE DELIVERY OF THE EDUCATIONAL PROGRAM.

The following elements are generally present:

- the school has established an administrative structure with staff, operational systems, policies and procedures that allow the school to carry out its academic program;
- the organizational structure establishes distinct lines of accountability with clearly defined roles and responsibilities;
- the school has a clear student discipline system in place at the administrative level that is consistently applied;
- the school retains quality staff;
- the school has allocated sufficient resources to support the achievement of goals;
- the school maintains adequate student enrollment;
- 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 adjusts its recruitment efforts accordingly; and
- the school regularly monitors and evaluates the school's programs and makes changes if necessary.

2D – BOARD OVERSIGHT

THE SCHOOL BOARD WORKS EFFECTIVELY TO ACHIEVE THE SCHOOL'S ACCOUNTABILITY PLAN GOALS.

The following elements are generally present:

- board members possess adequate skills and have put in place structures and procedures with which to govern the school and oversee management of day-to-day operations in order to ensure the school's future as an academically successful, financially healthy and legally compliant organization;
- the board requests and receives sufficient information to provide rigorous oversight of the school's program and finances;
- it establishes clear priorities, objectives and long-range goals, (including Accountability Plan, fiscal, facilities and fundraising), and has in place benchmarks for tracking progress as well as a process for their regular review and revision;
- the board successfully recruits, hires and retains key personnel, and provides them with sufficient resources to function effectively;
- the board regularly evaluates its own performance and that of the school leaders and the management company (if applicable), holding them accountable for student achievement; and
- the board effectively communicates with the school community including school leadership, staff, parents/guardians and students.

2E – GOVERNANCE

THE BOARD IMPLEMENTS, MAINTAINS AND ABIDES BY APPROPRIATE POLICIES, SYSTEMS AND PROCESSES.

The following elements are generally present:

- the board effectively communicates with its partner or management organizations as well as key contractors such as back-office service providers and ensures that it receives value in exchange for contracts and relationships it enters into and effectively monitors such relationships;
- the board takes effective action when there are organizational, leadership, management, facilities or fiscal deficiencies; or where the management or partner organization fails to meet expectations; to correct those deficiencies and puts in place benchmarks for determining if the partner organization corrects them in a timely fashion;
- the board regularly reviews and updates board and school policies as needed and has in place an orientation process for new members;
- the board effectively recruits and selects new members in order to maintain adequate skill sets and expertise for effective governance and structural continuity;
- the board implements a comprehensive and strict conflict of interest policy (and/or code of ethics)—consistent with that set forth in the charter and with the General Municipal Law—and consistently abides by them throughout the term of the charter;

- the board generally avoids conflicts of interest; where not possible, the board manages those conflicts in a clear and transparent manner;
 - the board implements a process for dealing with complaints consistent with that set forth in the charter, makes the complaint policy clear to all stakeholders, and follows the policy including acting on complaints in a timely fashion;
 - the board abides by its by-laws including, but not limited to, provisions regarding trustee election and the removal and filling of vacancies; and
 - the board holds all meetings in accordance with the Open Meetings Law and records minutes for all meetings including executive sessions and, as appropriate, committee meetings.
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2F – LEGAL REQUIREMENTS

THE SCHOOL SUBSTANTIALLY COMPLIES WITH APPLICABLE LAWS, RULES AND REGULATIONS AND THE PROVISIONS OF ITS CHARTER.

The following elements are generally present:

- the school compiles a record of substantial compliance with the terms of its charter and applicable state and federal laws, rules and regulations including, but not limited to, submitting items to the Institute in a timely manner, and meeting teacher certification (including NCLB highly qualified status) and background check requirements, FOIL and Open Meetings Law;
 - the school substantially complies with the terms of its charter and applicable laws, rules and regulations;
 - the school abides by the terms of its monitoring plan;
 - the school implements effective systems and controls to ensure that it meets legal and charter requirements;
 - the school has an active and ongoing relationship with in-house or independent legal counsel who reviews and makes recommendations on relevant policies, documents, transactions and incidents and who also handles other legal matters as needed; and
 - the school manages any litigation appropriately and provides litigation papers to insurers and the Institute in a timely manner.
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RENEWAL QUESTION 3
IS THE SCHOOL FISCALLY SOUND?

3A – BUDGETING AND LONG RANGE PLANNING

THE SCHOOL OPERATES PURSUANT TO A LONG-RANGE FINANCIAL PLAN IN WHICH IT CREATES REALISTIC BUDGETS THAT IT MONITORS AND ADJUSTS WHEN APPROPRIATE.

The following elements are generally present:

- the school has clear budgetary objectives and budget preparation procedures;
- board members, school management and staff contribute to the budget process, as appropriate;
- the school frequently compares its long-range fiscal plan to actual progress and adjusts it to meet changing conditions;
- the school routinely analyzes budget variances; the board addresses material variances and makes necessary revisions; and
- actual expenses are equal to, or less than, actual revenue with no material exceptions.

3B – INTERNAL CONTROLS

THE SCHOOL MAINTAINS APPROPRIATE INTERNAL CONTROLS AND PROCEDURES.

The following elements are generally present:

- the school follows a set of comprehensive written fiscal policies and procedures;
- the school accurately records and appropriately documents transactions in accordance with management's direction, laws, regulations, grants and contracts;
- the school safeguards its assets;
- the school identifies/analyzes risks and takes mitigating actions;
- the school has controls in place to ensure that management decisions are properly carried out and monitors and assesses controls to ensure their adequacy;
- the school's trustees and employees adhere to a code of ethics;
- the school ensures duties are appropriately segregated, or institutes compensating controls;
- the school ensures that employees performing financial functions are appropriately qualified and adequately trained;
- the school has systems in place to provide the appropriate information needed by staff and the board to make sound financial decisions and to fulfill compliance requirements;
- a staff member of the school reviews grant agreements and restrictive gifts and monitors compliance with all stated conditions;
- the school prepares payroll according to appropriate state and federal regulations and school policy;
- the school ensures that employees, trustees and volunteers who handle cash and investments are bonded to help assure the safeguarding of assets; and
- the school takes corrective action in a timely manner to address any internal control or compliance deficiencies identified by its external auditor, the Institute, and/or the State Education Department or the Comptroller, if needed.

3C – FINANCIAL REPORTING

THE SCHOOL HAS COMPLIED WITH FINANCIAL REPORTING REQUIREMENTS BY PROVIDING THE SUNY TRUSTEES AND THE STATE EDUCATION DEPARTMENT WITH REQUIRED FINANCIAL REPORTS THAT ARE ON TIME, COMPLETE AND FOLLOW GENERALLY ACCEPTED ACCOUNTING PRINCIPLES.

The following reports have generally been filed in a timely, accurate and complete manner:

- annual financial statement audit reports including federal Single Audit report, if applicable;
- annual budgets and cash flow statements;
- un-audited quarterly reports of income, expenses, and enrollment;
- bi-monthly enrollment reports to the district and, if applicable, to the State Education Department including proper documentation regarding the level of special education services provided to students; and
- grant expenditure reports.

3D – FINANCIAL CONDITION

THE SCHOOL MAINTAINS ADEQUATE FINANCIAL RESOURCES TO ENSURE STABLE OPERATIONS. CRITICAL FINANCIAL NEEDS OF THE SCHOOL ARE NOT DEPENDENT ON VARIABLE INCOME (GRANTS, DONATIONS AND FUNDRAISING).

The following elements are generally present:

- the school maintains sufficient cash on hand to pay current bills and those that are due shortly;
- the school maintains adequate liquid reserves to fund expenses in the event of income loss (generally three months);
- the school prepares and monitors cash flow projections;
- If the school includes philanthropy in its budget, it monitors progress toward its development goals on a periodic basis;
- If necessary, the school pursues district state aid intercepts with the state education department to ensure adequate per pupil funding; and
- the school accumulates unrestricted net assets that are equal to or exceed two percent of the school's operating budget for the upcoming year.



RENEWAL QUESTION 4

IF THE SCHOOL'S CHARTER IS RENEWED, WHAT ARE ITS PLANS FOR THE TERM OF THE NEXT CHARTER PERIOD, AND ARE THEY REASONABLE, FEASIBLE AND ACHIEVABLE?

4A – PLANS FOR THE SCHOOL'S STRUCTURE

KEY STRUCTURAL ELEMENTS OF THE SCHOOL, AS DEFINED IN THE EXHIBITS OF THE APPLICATION FOR CHARTER RENEWAL, ARE REASONABLE, FEASIBLE AND ACHIEVABLE.

Based on elements present in the Application for Charter Renewal:

- the school is likely to fulfill its mission in the next charter period;
- the school has an enrollment plan that can support the school program;
- the school calendar and daily schedules clearly provide sufficient instructional time to meet all legal requirements, allow the school to meet its proposed Accountability Plan goals and abide by its proposed budget;
- key design elements are consistent with the mission statement and are feasible given the school's budget and staffing;
- a curriculum framework for added grades aligns with the state's performance standards; and
- plans in the other required Exhibits indicate that the school's structure is likely to support the educational program.

4B – PLANS FOR THE EDUCATIONAL PROGRAM

THE SCHOOL'S PLANS FOR IMPLEMENTING THE EDUCATIONAL PROGRAM ALLOW IT TO MEET ITS ACCOUNTABILITY PLAN GOALS.

Based on elements present in the Application for Charter Renewal:

- for those grades served during the last charter period, the school has plans for sustaining and (where possible) improving upon the student outcomes it has compiled during the last charter period including any adjustments or additions to the school's educational program;
- for a school that is seeking to add grades, the school is likely to meet its Accountability Plan goals and the SUNY Renewal Benchmarks at the new grade levels; and
- where the school will provide secondary school instruction, it has presented a set of requirements for graduation that students are likely to meet and that are consistent with the graduation standards set by the Board of Regents.

4C – PLANS FOR BOARD OVERSIGHT AND GOVERNANCE

THE SCHOOL PROVIDES A REASONABLE, FEASIBLE AND ACHIEVABLE PLAN FOR BOARD OVERSIGHT AND GOVERNANCE.

Based on elements present in the Application for Charter Renewal:

- school trustees are likely to possess a range of experience, skills, and abilities sufficient to oversee the academic, organizational and fiscal performance of the school;
- plans by the school board to orient new trustees to their roles and responsibilities, and, if appropriate, to participate in ongoing board training are likely to sustain the board's ability to carry out its responsibilities;
- if the school plans to change an association with a partner or management organization in the term of a future charter, it has provided a clear rationale for the disassociation and an outline indicating how it will manage the functions previously associated with that partnering organization; and
- if the school is either moving from self-management to a management structure or vice-versa, or is changing its charter management organization/educational service provider, its plans indicate that it will be managed in an effective, sound and viable manner including appropriate oversight of the academic and fiscal performance of the school or the management organization.

4D – FISCAL & FACILITY PLANS

THE SCHOOL PROVIDES A REASONABLE, FEASIBLE AND ACHIEVABLE FISCAL PLAN INCLUDING PLANS FOR AN ADEQUATE FACILITY.

Based on the elements present in the Application for Charter Renewal:

- the school's budgets adequately support staffing, enrollment and facility projections;
- fiscal plans are based on the sound use of financial resources to support academic program needs;
- fiscal plans are clear, accurate, complete and based on reasonable assumptions;
- information on enrollment demand provides clear evidence for the reasonableness of projected enrollment; and
- facility plans are likely to meet educational program needs.

