Application: Bronx Charter School for Excellence 2

Monica Rios - [redacted]
2024-2025 Annual Report

Entry 1 – School Information and Cover Page

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

Each Annual Report begins with a completed School Information and Cover Page. The information is collected in a survey format within the Annual Report Portal. When entering information in the portal, some of the following items may not appear, depending on your authorizer and/or your responses to related items.

Entry 1 – School Information and Cover Page

(New schools that were not open for instruction for the 2024-2025 school year are not required to complete or submit an annual report this year).

Please be advised that you will need to complete this cover page (including signatures) before all of the other tasks assigned to you by your school's authorizer are visible on your task page. While completing this cover page task, please ensure that you select the correct authorizer **(as of June 30, 2025)** or you may not be assigned the correct tasks.

BASIC INFORMATION

a. LEGAL SCHOOL NAME (as chartered)

(Select name from the drop down menu)

Bronx Charter School for Excellence 2

b. Unofficial or Popular School Name

Bronx Excellence 2

c. CHARTER AUTHORIZER (As of June 30th, 2025)

Please select the correct authorizer as of June 30, 2025 or you may not be assigned the correct tasks.

SUNY BOARD OF TRUSTEES

c. School Unionized

Is your charter school unionized?

No

d. District/CSD of Location

New York City Community School District #11

e. Date of Approved Initial Charter

Oct 12 2015

f. Date School First Opened for Instruction

Sep 6 2016

g. Approved School Mission

(Regents, NYCDOE, and Buffalo BOE-authorized schools only)

We are authorized by SUNY,

h. Approved Key Design Elements

(Regents, NYCDOE, and Buffalo BOE-authorized schools only)

We are authorized by SUNY,

i. School Website Address

www.excellencecommunityschools.org

j. Authorized Charter Enrollment for 2024-2025 School Year

540

k. Actual Enrollment on June 30, 2025, Excluding Pre-K Program Enrollment

508

l. Grades Served

Grades served during the 2024-2025 school year (exclude Pre-K program students):

Responses Selected:

Kindergarten
1
2
3
4
5
6
7
8

m. Charter Management Organization/Educational Management Organization

Do you have a Charter Management Organization?

Yes

m1. Charter Management Organization Name

Include required contact information (email address and telephone number) below.

Excellence Community Schools Inc.

m2. Charter Management Organization Email Address

[redacted]

m3. Charter Management Organization Phone Number

718-828-7301

FACILITIES INFORMATION

n. FACILITIES: Owned, rented, or leased to educate students

Will the school maintain or operate multiple sites in 2025-2026?

	Yes, 2 sites

School Site 1 (Primary)

n1. SCHOOL SITES

Please provide information on Site 1 for the upcoming school year.

	Physical Address	Phone Number	District/CSD	Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.)	Grades to be Served at Site for 2025-2026 school year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 1	1804 HOlland Ave, Bronx NY 10462	718-892-1276	New York City Community School District #11	K-4	K-4	K-4

n1a. Please provide the contact information for Site 1.

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Sharleen Morris	Principal	718-892-1276		[redacted]
Operational Leader	Winsome Nevins Warden	Director of School Operations	718-892-1276		[redacted]
Compliance Contact	Monica Rios	Regional Director of School Operations	718-892-1276		[redacted]
Complaint Contact	Sharleen Morris	Principal	718-892-1276		[redacted]
DASA Coordinator	Tamara Forrest	Senior HR Manager	718-892-1309		[redacted]
Phone Contact for After Hours Emergencies	Leroy Clark	Facility Manager	732-797-8879		[redacted]

n1b. Is site 1 in public space or in private space?

Private Space

n1c. Is site 1 in a co-located or not in a co-located facility?

Responses Selected:

Not Co-Located

IF LOCATED IN PRIVATE SPACE IN NYC OR IN DISTRICTS OUTSIDE NYC

n1e. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 1 if located in private space in NYC or located outside of NYC .

Certificate of Occupancy and Fire Inspection. Provide a copy of a current and non-expired certificate of occupancy (if outside NYC or in private space in NYC). For schools that are not in district space (NYC co-locations), provide a copy of a current and non-expired certificate of occupancy, and a copy of the current annual fire inspection results, which should be dated on or after July 1, 2025.

Fire inspection certificates must be updated annually. For the upcoming school year 2025-2026, please submit a current fire inspection certificate.

If the fire inspection certificate will expire between the August 1, 2025 submission of the Annual Report and the November 3 Annual Report submission, please submit the new certificate with the Annual Report entries due no later than 11:59 PM on November 3, 2025.

Site 1 Certificate of Occupancy (COO)

1804 Holland _CO.pdf

Filename: 1804 Holland _CO.pdf **Size:** 80.6 kB

Site 1 Fire Inspection Report

This is required, marked optional for administrative purposes.

School Site 2

n2. SCHOOL SITES

Please provide information on Site 2 for the upcoming school year.

	Physical Address	Phone Number	District/CSD	Grades Served at Site for 2024-2025 School Year (K-5, 6-9, etc.)	Grades to Be Served at Site for 2025-2026 School Year (K-5, 6-9, etc.)	Receives Rental Assistance for Which Grades (If yes, enter the appropriate grades. If no, enter No).
Site 2	1744 Williamsbridge Road, Bronx NY 10461	929-388-4232	New York City Community School District #11	5-8	5-8	

n2a. Please provide the contact information for Site 2.

	Name	Title	Work Phone	Alternate Phone	Email Address
School Leader	Adije Okpo	Principal	929-388-4232		[redacted]
Operational Leader	Dasia Wingate	Director of School Operations	929-388-4232		
Compliance Contact	Monica Rios	Regional Director of School Operations	929-388-4232		
Complaint Contact	Adije Okpo	Principal	929-388-4232		
DASA Coordinator	Tamara Forrest	Senior HR Manager	718-892-1309		
Phone Contact for After Hours Emergencies	Heriberto Sanchez	Facilities Manager	929-388-4232		

n2b. Is site 2 in public space or in private space?

Private Space

n2c. Is site 2 in a co-located or not in a co-located facility?

Responses Selected:

No Co-Located

IF LOCATED IN PRIVATE SPACE IN NYC OR IN DISTRICTS OUTSIDE NYC

n2e. Upload a current Certificate of Occupancy (COO) and the annual Fire Inspection Report for school site 2 if located in private space in NYC or located outside of NYC .

Certificate of Occupancy and Fire Inspection. Provide a copy of a current and non-expired certificate of occupancy (if outside NYC or in private space in NYC). For schools that are not in district space (NYC co-locations), provide a copy of a current and non-expired certificate of occupancy, and a copy of the current annual fire inspection results, which should be dated on or after July 1, 2025.

Fire inspection certificates must be updated annually. For the upcoming school year 2025-2026, please submit a current fire inspection certificate.

If the fire inspection certificate will expire between the August 1, 2025 submission of the Annual Report and the November 3 Annual Report submission, please submit the new certificate with the Annual Report entries due no later than 11:59 PM on November 3, 2025.

Site 2 Certificate of Occupancy (COO)

OSL CO.pdf

Filename: OSL CO.pdf **Size:** 4.7 MB

Site 2 Fire Inspection Report

This is required, marked optional for administrative purposes.

o. List of owned, rented, or leased facilities not used to educate students and the purpose of each.

Separate by semi-colon (;)

N/A

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p1. Total Number of School Calendar Days

180

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p2. Total Number of Anticipated Hours of Instruction by Month (Entries are required for all months. Enter a zero for months with no instructional hours.)

July 2025	0
August 2025	0
September 2025	140
October 2025	145
November 2025	110
December 2025	115
January 2026	130
February 2026	105
March 2026	147
April 2026	115
May 2026	135
June 2026	84

CHARTER REVISIONS DURING THE 2024-2025 SCHOOL YEAR

q. Summary of Material and Non-Material Charter Revisions submitted or approved since August 1, 2024, including updates to the school's board of trustees' by-laws, enrollment policy, discipline policy, or complaint policy.

Please note, listing the revisions here does not constitute a request. Schools are advised to seek revision requests through their authorizer directly.

Does the school have any material or non-material revision requests that have been submitted or approved since August 1, 2024?

No

ATTESTATIONS

r. Name/Position of Person Completing/Submitting the 2024-2025 Annual Report. (To write type in a phone number with an extension, please use this format: 123-456-7890-3. The dash and number 3 at the end of the phone number refers to the individual's phone extension. Do not type in the work extension or the abbreviation for it - just the dash and the extension number after the phone number).

Name	Monica Rios
Position	Regional Director of School Operations
Phone/Extension	718-828-7301
Email	[redacted]

s. Our signatures (Executive Director/School Leader/Head of School and Board President) below attest that all of the information contained herein is truthful and accurate and that this charter school is in compliance with all aspects of its charter, and with all pertinent Federal, State, and local laws, regulations, and rules. We understand that if any information in any part of this report is found to have been deliberately misrepresented, this will constitute grounds for the revocation of our charter.

Click YES to agree and then use the mouse on your PC or the stylus on your mobile device to sign your name).

Responses Selected:

Yes

As outlined in ENTRY 7 (Employee Fingerprint Requirements Attestation):

Our E-Signatures (not digital signatures) (Executive Director/School Leader/Head of School and Board President) below attest that our school has reviewed, understands and will comply with the employee clearance and fingerprint requirements as outlined in Entry 7 and found in the NYSED CSO Fingerprint Clearance Oct 2019 Memo. Click YES to agree.

Responses Selected:

Yes

Signature, Head of Charter School

(If you are not signing the application now, please click "Clear" on both signature fields before saving this task or else the system will return an error.)

[redacted]

Signature, President of the Board of Trustees

(If you are not signing the application now, please click "Clear" on both signature fields before saving this task or else the system will return an error.)

[redacted]

Date

Aug 1 2025

Thank you.

Entry 2 – Links to Critical Documents on School Website

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools (Note that SUNY-authorized charter schools are not required to submit item 4: Authorizer-approved Dignity for All Students Act (DASA) policy and Authorizer-approved School Discipline Policy)

By law, each charter school is required to maintain certain notices and policies listed on its website. All documents must be readily found on the school's website and publicly accessible. Please insert the link to the page on the school's website where each document can be accessed. **DO NOT provide a direct link to a Google document.**

1. Current Annual Report (i.e., 2024-2025 Annual Report);[1]
2. Board meeting notices, agendas, and documents, including board meeting minutes;
3. New York State School Report Card - This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law.[2] Even if there is no school data yet reported, a direct web link to the most recent New York State School Report Card for the charter school must be provided.
4. Authorizer-approved DASA Policy and Authorizer-approved School Discipline Policy **(For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)**;
5. District-wide safety plan, not a building-level safety plan (as per the July 2023 Emergency Response Plan Memo – Charter Schools Only);
6. Authorizer-approved FOIL Policy; and
7. Subject matter list of FOIL records (e.g., see NYSED Subject Matter List)

[1] Each charter school is required to make the Annual Report publicly available by August 1 and to post on their respective charter school website. Each school should post an updated and complete version to include accountability data and financial statements that are not or may not be available until after the August deadline (i.e., repost when financials have been submitted in November.)

[2] SRC data is included in the reporting requirements for New York charter schools in 8 NYCRR 119.3.

Entry 2 – Links to Critical Documents on School Website

School Name: Bronx Charter School for Excellence 2

Required of ALL Charter Schools (Note that SUNY-authorized charter schools are not required to submit item 4: Authorizer-approved Dignity for All Students Act (DASA) policy and Authorizer-Approved School Discipline Policy)

By law, each charter school is required to maintain certain notices and policies listed on its website. Please insert the link from the school's website for each of the items. All links must be readily found on the school's website.

New York State Report Card

Emergency Response Plan Memo

NYSED Subject Matter List

	Link to Documents
1. Current Annual Report (i.e., 2024-2025 Annual Report)	https://www.excellencecommunityschools.org/about-us/board-of-trustees
2. Board meeting notices, agendas, and documents, including board meeting minutes	https://www.excellencecommunityschools.org/about-us/board-of-trustees
3. New York State School Report Card. This report captures school-level enrollment and demographic information, staff qualifications, electronic student records, and attendance rates, as prescribed by New York State law. Even if there is no school data yet reported, a direct web link to the most recent New York State School Report Card for the charter school must be provided.	https://data.nysed.gov/profile.php?instid=800000056707
4a. Authorizer-approved DASA Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	
4b. Authorizer-approved School Discipline Policy (For Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY)	
5. District-wide safety plan, not a building level safety plan (as per the July 2023 Emergency Response Plan Memo)	https://www.excellencecommunityschools.org/policies-and-procedures
6. Authorizer-approved FOIL Policy	https://www.excellencecommunityschools.org/legal
7. Subject matter list of FOIL records (e.g., see NYSED	https://www.excellencecommunityschools.org/legal

Subject Matter List)	

It is the school's responsibility to ensure that if a policy appears in more than one place on the website, including as part of the family handbook, that the policy versions are consistent and up to date.

Responses Selected:

Yes, the website has been reviewed to ensure that policies are consistent and up to date.

Thank you.

Entry 3 – Board of Trustees Membership Table

Completed - Aug 1 2025

Instructions

Required of ALL charter schools

ALL charter schools or education corporations governing multiple schools must complete the Board of Trustees Membership Table within the online portal. Please be sure to include and identify parents who are members of the Board of Trustees and indicate whether parents are voting or non-voting members.

Entry 3 – Board of Trustees Membership Table

1. **SUNY-AUTHORIZED** charter schools are required to provide information for VOTING trustees only.
2. **REGENTS, NYCDOE**, and **BUFFALO BOE-AUTHORIZED** charter schools are required to provide information for all VOTING and NON-VOTING trustees.

Authorizer:

Who is the authorizer of your charter school?

SUNY

1. 2024-2025 Board Member Information (Enter info for each BOT member)

	Voting Trustee Name	Trustee Email Address	Position on the Board	Committee Affiliation (s)	Voting Member Per By-Laws (Y/N)	Number of Completed Terms Served	Start Date of Current Term (MM/DD/YYYY)	End Date of Current Term (MM/DD/YYYY)	Board Meetings Attended During 2024-2025
1	Kathy Lathen	[redacted]	Chair	Executive, Discipline ,Finance	Yes	4	07/02/2024	06/20/2027	5 or less
2	Joyce Frost	[redacted]	Vice Chair	Executive, Discipline, Finance	Yes	7	07/01/2025	06/30/2028	5 or less
3	Joe Lewis	[redacted]	Treasurer	Executive, Discipline, Finance	Yes	3	05/07/2025	05/06/2028	5 or less
4	Stacey Lauren	[redacted]	Secretary	Executive, Discipline, Education,	Yes	5	12/01/2024	11/30/2027	5 or less
5	ExOfficio Parent Rep	[redacted]	Parent Rep	N/A	No	1	07/01/2025	06/30/2025	5 or less
6									
7									
8									
9									

1a. Are there more than 9 members of the Board of Trustees?

No

2. Number of board meetings conducted in 2024-2025

5

3. Number of board meetings scheduled for the 2025-2026 school year

5

4. INFORMATION ABOUT MEMBERS OF THE BOARD OF TRUSTEES

- SUNY-AUTHORIZED charter schools provide response relative to VOTING Trustees only.
- REGENTS, NYCDOE, and BUFFALO BOE-AUTHORIZED charter schools provide a response relative to all trustees.

a. Total number of Voting Members on June 30, 2025	4
b. Total number of Voting Members added during the 2024-2025 school year	0
c. Total number of Voting Members who left the board during 2024-2025 school year	0
d. Total Maximum Number of Voting Members in 2024-2025, as set by the board in by-laws, resolution, or minutes	4
e. Board members attending 8 or fewer meetings during 2024-2025	4

Thank you.

Entry 4 – Board of Trustees Disclosure of Financial Interest Form

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

Each member of the charter school's Board of Trustees who served on a charter school education corporation governing one or more charter schools for any period during the 2024-2025 school year must complete and sign a Trustee Disclosure of Financial Interest Form due **no later than 11:59 PM on August 1, 2025**. Acceptable signature formats include:

- Digitally certified PDF signature (i.e., DocuSign)
- Manual signature (1. download to print, 2. manually sign, 3. scan signed document to PDF, and 4. upload into portal)

All completed forms must be collected and uploaded in PDF format for each individual member. **The education corporation is responsible for ensuring that each member who served on the board during the 2024-2025 school year completes the form.**

Charter schools MUST submit the latest version of the form. Forms completed from past years will not be accepted.

Trustees serving on an education corporation that governs more than one school are not required to complete a separate disclosure for each school governed by the education corporation. In the Trustee Disclosure of Financial Interest Form, trustees must disclose information relevant to any of the schools served by the governing education corporation.

2024-2025-trustee-financial-disclosure-form - Joyce Drost

Filename: 2024-2025-trustee-financial-disclo_3DgagIV.pdf **Size:** 303.7 kB

2024-2025-trustee-financial-disclosure-form - Joseph Lewis

Filename: 2024-2025-trustee-financial-disclo_ahCyAWW.pdf **Size:** 296.6 kB

2024-2025-trustee-financial-disclosure-form - Stacey Lauren

Filename: 2024-2025-trustee-financial-disclo_g6qfd32.pdf **Size:** 497.4 kB

2024-2025-trustee-financial-disclosure-form - Kathy Lathen

Filename: 2024-2025-trustee-financial-disclo_z2Cjj83.pdf **Size:** 483.4 kB

Entry 6 – Enrollment & Retention

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

Describe the good faith efforts the charter school has made in 2024-2025 toward meeting targets to attract and retain the enrollment of students with disabilities (SWD), English language learners (ELL), and students who are economically disadvantaged (ED). In addition, describe the school's plans for meeting or making progress toward meeting its enrollment and retention targets in 2025-2026.

Entry 6 – Enrollment and Retention of Special Populations

Good Faith Efforts to Meet Recruitment Targets (Attract)

	Describe Recruitment Efforts in 2024-2025	Describe Recruitment Plans in 2025-2026
Students with Disabilities	During our student recruitment process, prospective families who indicate they have a child with a disability are informed that we have a dedicated student support service department that will help them one on one once they are accepted.	We will continue to extend our time and knowledge on a case by case basis for those families who have a child with a disability. It is very important for us to keep this culture as it shows how hard we are willing to work with a parent in making their child succeed no matter what setting is required.
English Language Learners	As part of our student recruitment process every year, we advertise in various local papers. During this time, bilingual staff members from BCSE visit various early childhood education centers to distribute applications and share knowledge about what the school has to offer for students who are English Language Learners (ELL). Currently, our applications are translated in Spanish and Bengali.	We will continue our efforts by continuing to advertise and visit early childhood education centers. We will also attend Charter School open houses that are offered by the NYC Charter School Center. We hope to one day be able to set up a Charter School open house solely in the Bronx to reach out to more families.
Economically Disadvantaged	During our student recruitment process, we widely advertise our admissions window in Bronx newspapers that reaches out to various areas where economically disadvantaged families reside. For our online application, we indicate it as a preference to encourage families to apply. We inform families we are a public school and that there is no cost associated with attending. For families who are severe need and cannot afford the entire uniform, we provide as much assistance as we can so they get what they need.	We will continue all advertising efforts that we know are viewable to areas of ED families. We also advertise in free newspapers so that we reach families who are unable to afford to purchase other publications. We will continue to provide assistance for uniforms for those families who are in severe need.

Good Faith Efforts To Meet Retention Targets

	Describe Retention Efforts in 2024-2025	Describe Retention Plans in 2025-2026
Students with Disabilities	BCSE mainstreams students with special needs. Additionally, BCSE serves students who have special learning needs and provides services including: Integrated Coteaching (ICT), Special Education Teacher Support Services (SETSS), Counseling, Speech, Occupational Therapy and Physical Therapy. We also have staffed positions whose focus is solely on student with disabilities. They work hard to get students the services they need so that eventually the student can be phased out of the Individualized Educational Plan they were given.	We will continue to work with families on a case-by-case basis to educate them on what the child's IEP means and why they should receive the recommended service. We will begin servicing the child as soon as possible. If for any reason, a parent doesn't agree with the mandated services, we will help them with the appeal process as well. The ultimate goal is get the correct services for the student so that they can eventually go from what may be a complex setting to a less complex setting then eventually phasing out.
English Language Learners	At the time of registration, families are given a survey that helps to identify what the primary language in the household is. We find that 10%-15% of kindergarten students are eligible for NYSITELL testing. This test helps us identify the level of English proficiency in the student. Through immersion and high quality assistance from the teachers, students are tested out by the time they first or second grade.	The process for identifying ELL students will remain the same as it has worked over the years. One new addition we will work to implement this year is purchasing literature or software. An additional supplement they can do at home with their families so that they all are getting the benefit of learning.
Economically Disadvantaged	Once we have established who falls into the criteria, we are able to connect with camps and programs that specifically target this population. We then work with the families who are interested in these programs and go	We will continue to research what programs are offered to this specific population and provide them with as many opportunities as we can for their children. We are working on obtaining uniform vouchers for those

	through the steps of putting the student in the program. Programs have been offered during the school year and in the summer.	families who absolutely cannot afford uniforms for their children.

Entry 7 – Employee Fingerprint Requirements Attestation

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

Review and complete the Employee Fingerprint Requirements Attestation.

Entry 7 – Employee Fingerprint Requirements Attestation

A. TEACH System – Employee Clearance

Required of ALL Charter Schools

Charter schools MUST ensure that all prospective employees[1] receive clearance through the NYSED Office of School Personnel Review and Accountability (OSPRA) prior to employment. **This includes paraprofessionals and other school personnel who are provided or assigned by the district of location, or related/contracted service providers**. After an employee has been cleared, schools are required to maintain proof of such clearance in the file of each employee.

Please note that all schools should maintain an electronic or hard copy of the clearance certification pulled from TEACH and dated PRIOR to the employee's start date. Clearance certifications pulled from TEACH at a later date will show that the staff member was cleared as of that date and may result in a finding of clearance violations against the school.

[1] Employees who must be cleared include, but are not limited to, teachers, administrative staff, janitors, security personnel and cafeteria workers, and other staff who are present when children are in the school building. **This includes paraprofessionals and other school personnel that are provided or assigned by the district of location, as well as related/contracted service providers**. See NYSED memorandum dated October 1, 2019 at NYSED CSO Employee Clearance and Fingerprint Memo or visit the NYSED website at Who Must Be Fingerprinted Charts for more information regarding who must be fingerprinted. Also see, 8 NYCRR §87.2.

B. Emergency Conditional Clearances

Charter schools are **strongly discouraged** from using the emergency conditional clearance provisions for prospective employees. This is because the school must request clearance through NYSED TEACH, and the school's emergency conditional clearance of the employee terminates automatically once the school receives notification from NYSED regarding the clearance request. Status notification is provided for all prospective employees through the NYSED TEACH portal within 48 hours after the clearance request is submitted. Therefore, at most, a school's emergency conditional clearance will be valid for only 48 hours after approval by the board.

Schools are not permitted to renew or in any way re-establish a prospective employee's emergency conditional clearance after status notification is sent by NYSED through the TEACH portal.

Schools are asked to attest that they have reviewed and understand these requirements. More information can be found in the memo at NYSED CSO Employee Clearance and Fingerprint Memo.

Attestation

Responses Selected:

I hereby attest that the school has reviewed, understands, and will comply with these requirements.

Entry 9 – School Calendar

Completed - Aug 1 2025

Instructions

Required of ALL Charter Schools

Charter schools must upload a final 2025-2026 calendar into the portal **no later than 11:59 PM on August 1, 2025**.

School calendars must meet the minimum instructional requirements as required of other public schools "… *unless the school's charter requires more instructional time than is required under the regulations."*

Board of Regents-authorized charter schools are also required to submit **school calendars that clearly indicate the start and end date of the instructional year AND the number of instructional hours and/or instructional days for each month**. **Schools must use a calendar format and ensure there is a monthly tally of instructional days**.

Charter schools serving elementary and secondary levels may submit one combined calendar showing instructional hours and days for all building levels OR separate calendars uploaded as one PDF. *Note that school calendars will also provide evidence of alignment for schools with extended days/years referenced in their mission statements or key design elements.*

See below for an example of a calendar showing the requested information.

Sample Calendar:

Bronx Snapshot Calendar 2025-2026

Filename: Bronx_Snapshot_Calendar_2025-2026_qp78DcZ.pdf **Size:** 171.3 kB

Entry 11 – Progress Toward Goals (SUNY-Authorized Charter Schools ONLY)

Completed - Sep 16 2025

Instructions

SUNY-Authorized Charter Schools ONLY - Complete Template and Upload to Epicenter

SUNY-authorized charter schools must download an Accountability Plan Progress Report template at Accountability Plan Progress Report. After completing, SUNY-authorized charter schools must upload the document into the Annual Report Portal **and** into the SUNY Epicenter document management system **no later than 11:59 PM on September 15, 2025**.

PLEASE NOTE: This is a required task for SUNY-authorized charter schools. It is marked optional for administrative purposes only.

2024-25 APPR_Bronx 2 final

Filename: 4754534544464f6d9ffe560962900f82.pdf **Size:** 556.7 kB

Entry 11 – Progress Toward Goals (Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY

Incomplete

Instructions

Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY

Board of Regents, NYCDOE, and Buffalo BOE-authorized schools must report all Progress Toward Charter Goals as per their currently approved charters **no later than 11:59 PM on November 3, 2025**.

Schools must complete the "Goals" tables as provided in the tables below OR upload the most current action plan that includes progress made toward the attainment of goals during the 2024-2025 school year.

PLEASE NOTE: This is a required task for Regents, NYCDOE, and Buffalo BOE-authorized charter schools. It is marked optional for administrative purposes only.

Entry 11 – Progress Toward Goals

PROGRESS TOWARD CHARTER GOALS

Board of Regents, NYCDOE, and Buffalo BOE-authorized schools may complete the "Goals" tables as provided in the portal OR upload the school's most current action plan that includes progress made toward the attainment of academic, organization, and financial goals during the 2024-2025 school year.

Please select the method by which you will provide your school's information:

No Responses Selected

PROGRESS TOWARD CHARTER GOALS

Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY

Complete the tables provided. List each goal and measure as contained in the school's currently approved charter and indicate whether the school has met or not met the goal. Please provide information for all goals no later than November 3, 2025.

1. ACADEMIC STUDENT PERFORMANCE GOALS

Regents, NYCDOE, and Buffalo BOE-Authorized Charter Schools ONLY

The following tables reflect formatting in the online portal required for Board of Regents, NYCDOE, and Buffalo BOE-authorized charter schools only. These charter schools should report all Progress Toward Charter Goals as per their currently approved charters no later than **November 3, 2025.**

2. ORGANIZATION GOALS

2024-2025 Progress Toward Attainment of Organization Goals

	Organizational Goal	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Unable to Assess	If not met, describe efforts the school will take to meet goal. If unable to assess goal, type N/A for Not Applicable
Org Goal 1				
Org Goal 2				
Org Goal 3				
Org Goal 4				
Org Goal 5				
Org Goal 6				
Org Goal 7				
Org Goal 8				
Org Goal 9				
Org Goal 10				
Org Goal 11				
Org Goal 12				
Org Goal 13				
Org Goal 14				
Org Goal 15				
Org Goal 16				
Org Goal 17				
Org Goal 18				
Org Goal 19				
Org Goal 20				

5. Do have more organizational goals to add?

(No response)

3. FINANCIAL GOALS

2024-2025 Progress Toward Attainment of Financial Goals

	Financial Goals	Measure Used to Evaluate Progress	Goal - Met, Not Met, or Partially Met	If not met, describe efforts the school will take to meet goal.
Financial Goal 1				
Financial Goal 2				
Financial Goal 3				
Financial Goal 4				
Financial Goal 5				

Thank you.

Entry 12 – Audited Financial Statements

Completed - Nov 3 2025

Required of ALL Charter Schools

ALL charter schools must upload the financial statements and related documents in PDF format into the portal **no later than 11:59 PM on November 3, 2025.** The statements, the independent auditor's report, any advisory and/or management letter, and the internal controls report must be combined into a PDF file with security features such as password protection removed.

ALL SUNY-authorized charter schools must also enter the financial statements and upload related documents in PDF format into the SUNY Compass system **no later than 11:59 PM on November 3, 2025**. **SUNY-authorized charter schools** are asked to ensure that security features such as password protection are turned off.

PLEASE NOTE: This task appears as optional until August 1, 2025. Thereafter, it will be identified as a required task due on November 3, 2025.

BRONX CHARTER SCHOOL FOR EXCELLENCE - 06

Filename: 7973e8eb3e1e4413b2d994fc223e0345.pdf **Size:** 405.2 kB

Entry 13 – Fiscal Year 2025-2026 Budget

Incomplete

SUNY-authorized charter schools are required to use Compass to complete and submit the Annual Budget and the Budget Narrative Questionnaire **no later than 11:59 PM on November 3, 2025**.

Regents, NYCDOE, and Buffalo BOE-authorized charter schools are required to download the budget template from the portal or the Annual Reports webpage and complete it. Upload the completed template **no later than 11:59 PM on November 3, 2025**. The Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory.

PLEASE NOTE: This task appears as optional until August 1, 2025. Thereafter, it will be identified as a required task due on November 3, 2025.

Optional Additional Documents to Upload (BOR)

Incomplete

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name:

Joyce Frpst

Name of Charter School Education Corporation:

BRONX CHARTER SCHOOL FOR EXCELLENCE

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).
   Vice chair

2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption/guardianship to any student currently enrolled in a school operated by the education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a board member of the education corporation?

☐ **Yes** ☑ **No**

If **Yes**, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or education corporation; or do you serve as an employee, officer, or director of, or own a controlling interest in, a business or entity that contracts, or does business with, or plans to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities?

☐ **Yes** ☑ **No**

If **Yes**, please provide a description of the position(s) you hold, your responsibilities, your salary and your start date.

6. Identify each interest/transaction (and provide the requested information) that you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six months prior to such service. If there has been no such interest or transaction, check **None.**

☑ **None**

Date(s)	Nature of financial interest / transaction	Steps taken to avoid a conflict of interest, (e.g., did not vote, did not participate in discussion)	Name of person holding interest or engaging in transaction and relationship to you

7. Identify each individual, business, corporation, union association, firm, partnership, franchise holding company, joint-stock company, business or real estate trust, non-profit organization, or other organization or group of people doing business with the school(s) operated by the education corporation **and** in which such entity, during the time of your tenure as a trustee, you and/or your immediate family member(s) or person(s) you reside with had a financial interest or other relationship. If you are a member, director, officer, or employee of an organization formally partnered with and/or doing business with the school(s) through a management or services agreement, please identify only the name of the organization, your position in the organization, and the relationship between such organization and the school(s). If there was no financial interest, check **None**.

☑ **None**

Organization conducting business with the school(s)	Nature of business conducted	Approximate value of the business conducted	Name of Trustee and/or immediate family member of household holding an interest in the organization conducting business with the school(s) and the nature of the interest	Steps taken to avoid conflict of interest

This document is considered a public record and, as such, may be made available to members of the public upon request under the Freedom of Information Law. The personal contact information provided below will be redacted.

Business Telephone:

[redacted]

Business Address:

[redacted]

E-mail Address:

[redacted]

Home Telephone:

[redacted]

Home Address:

[redacted]

[redacted] 08/03/2024

Signature **Date**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually sign, scan to PDF

last revised 04/2022

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name:

Joseph Lewis

Name of Charter School Education Corporation:

BRONCHARTER SCHOOL FOR EXCELLENCE

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).
   Treasurer

2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption/guardianship to any student currently enrolled in a school operated by the education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a board member of the education corporation?

☐ **Yes** ☑ **No**

If **Yes**, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or education corporation; or do you serve as an employee, officer, or director of, or own a controlling interest in, a business or entity that contracts, or does business with, or plans to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities?

☐ **Yes** ☑ **No**

If **Yes**, please provide a description of the position(s) you hold, your responsibilities, your salary and your start date.

6. Identify each interest/transaction (and provide the requested information) that you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six months prior to such service. If there has been no such interest or transaction, check **None.**

☑ **None**

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☑ **None**

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Business Telephone:

[redacted]

Business Address:

520 madison

E-mail Address:

[redacted]

Home Telephone:

[redacted]

Home Address:

[redacted]

[redacted]

Joseph lewis (Aug 1, 2024 19:30 EDT) 08/01/2024

Signature **Date**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually sign, scan to PDF

last revised 04/2022

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name:

Stacey Lauren

Name of Charter School Education Corporation:

BRONXCHARTER SCHOOL FOR EXCELLENCE

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

   Board member
   Chair Education Committee

2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption/guardianship to any student currently enrolled in a school operated by the education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a board member of the education corporation?

☐ **Yes** ☑ **No**

If **Yes**, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or education corporation; or do you serve as an employee, officer, or director of, or own a controlling interest in, a business or entity that contracts, or does business with, or plans to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities?

☐ **Yes** ☑ **No**

If **Yes**, please provide a description of the position(s) you hold, your responsibilities, your salary and your start date.

6. Identify each interest/transaction (and provide the requested information) that you, any of your immediate family members, and/or any persons who you reside with have held or engaged in with the charter school(s) operated by the education corporation during the time you have served on the Board, and in the six months prior to such service. If there has been no such interest or transaction, check **None.**

☑ **None**

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☑ **None**

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Business Telephone:

[redacted]

Business Address:

[redacted]

E-mail Address:

[redacted]

Home Telephone:

[redacted]

Home Address:

[redacted]

[redacted] 07/31/2024

Signature **Date**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually sign, scan to PDF

last revised 04/2022

Disclosure of Financial Interest by a Current or Former Trustee

Trustee Name:

Kathleen Lathen

Name of Charter School Education Corporation:

BRONCHARTER SCHOOL FOR EXCELLENCE

1. List all positions held on the education corporation Board of Trustees ("Board") (e.g., chair, vice-chair, treasurer, secretary, parent representative, etc.).

   Chair

2. Are you related, by blood or marriage, to any person employed by the school and/or education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and the person's position, job description, and other responsibilities with the school.

3. Are you related by blood, or marriage, or legal adoption/guardianship to any student currently enrolled in a school operated by the education corporation?

   ☐ **Yes** ☑ **No**

   If **Yes**, please describe the nature of your relationship and if the student could benefit from your participation.

4. Are you related, by blood or marriage, to any person that could otherwise benefit from your participation as a board member of the education corporation?

☐ **Yes** ☑ **No**

If **Yes**, please describe the nature of your relationship and if this person could benefit from your participation.

5. Are you a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO"), whether for-profit or not-for-profit, which contracts, or may contract, with the charter school or education corporation; or do you serve as an employee, officer, or director of, or own a controlling interest in, a business or entity that contracts, or does business with, or plans to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities?

☐ **Yes** ☑ **No**

If **Yes**, please provide a description of the position(s) you hold, your responsibilities, your salary and your start date.

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☑ **None**

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☑ **None**

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Business Telephone:

[redacted]

Business Address:

E-mail Address:

[redacted]

Home Telephone:

[redacted]

Home Address:

[redacted]

[redacted]

Kathleen Lathen (Jul 30, 2024 13:44 EDT) 7/30/24

Signature **Date**

Acceptable signature formats include:

- Digitally certified PDF signature
- Print form, manually sign, scan to PDF

last revised 04/2022

Bronx Excellence – 2025-2026 School Calendar

180 school days

September 2025						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				
						21

October 2025						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
						22

November 2025						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						16

December 2025						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
						17

January 2026						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
						19

February 2026						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
						15

March 2026						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
						22

April 2026						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	21	23	24	25
	27	28	29	30		
						16

May 2026						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						20

June 2026						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				12

Dates to Know:

August 18 – New Teachers/Existing Employees Start/Return

June 6 – Optional Grade Book Entry Day – Paid as Saturday Academy Day.

Schedule Changes:

All Saturday academy days are scheduled from 9am-3pm

COLOR CODE DEFINITON:

- 00 Fed Holidays – Closed
- Recess - Closed
- Saturday Academy
- End of MP
- PT Conferences
- Network Wide PD (clerical day)
- First and Last Day of School
- State Testing (ELA, Math, Science)
- Gradebook entries due

Federal Holidays and School Breaks 2025/26 (school closures)

Sep 1	Labor Day	***Dec 24-Jan 2***	***Winter Recess***	***Apr 2-10***	***Spring Recess***
Oct 13	Indigenous Peoples' Day	Jan 1, 2026	New Year's Day	May 25	Memorial Day
Nov 4	Election Day/PD/Clerical	Jan 19	Martin L. King Day	June 4	PD/Clerical Day
Nov 11	Veteran's Day	***Feb 16-20***	***Mid-Winter Recess***	June 5	Administrative Day
Nov 27-28	Thanksgiving Recess	Feb 16	President's Day	June 19	Juneteenth

Bronx Charter School for Excellence 2

2024-25 ACCOUNTABILITY PLAN PROGRESS REPORT

Submitted to the SUNY Charter Schools Institute on September 16, 2025

By

By Sharleen Morris, Elementary Principal
Adije Okpo, Middle School Principal

1804 Holland Avenue, Bronx NY 10462 &
1734 Williamsbridge Road, Bronx NY 10461

(718) 892-1276/(929) 388-4232

2024-25 ACCOUNTABILITY PLAN PROGRESS REPORT

Sharleen Morris and Adije Okpo prepared this 2024-25 Accountability Progress Report on behalf of the charter school's board of trustees:

Trustee's Name	Board Position	
	Office (e.g., chair, treasurer, secretary)	Committees (e.g., finance, executive)
Kathy Lathen	Board Chair	Executive, Finance, Discipline
Joyce Frost	Vice Chair	Executive, Finance, Discipline
Joseph Lewis	Treasurer	Executive, Finance, Discipline
Stacey Lauren	Secretary	Executive, Discipline, Education

Sharleen Morris has served as Principal since 2017, and Adije Okpo has served as Principal since 2018.

SCHOOL OVERVIEW

Bronx Charter School for Excellence 2 (Bronx Excellence 2, Bronx 2) opened in the fall of 2016. In 2023, Bronx Excellence 2 was honored by the U.S. Department of Education with a National Blue Ribbon award as an Exemplary High Performing School. Bronx 2 also has previously earned the distinction of being named a Recognition School by NYSED. The award-winning Bronx Excellence approach provides a differentiated, project-based learning environment that seeks to develop high-level analytical and critical thinking skills in every scholar. During the 2024-2025 school year, Bronx 2 served 502 children in grades K-8.

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

Percentage distribution of 2024-2025 students by race/ethnicity

Ethnicity	Percentage
American Indian or Alaskan Native	0.60%
Asian	21.71%
Black/African American	32.87%
Hispanic/Latino	41.24%
Multiple Ethnicities	0.20%
Native Hawaiian or Other Pacific Islander	0.20%
White	3.19%

In addition, 87.85 % of our students are eligible for free or reduced lunch.

ENROLLMENT SUMMARY

School Enrollment by Grade Level and School Year

School Year	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2022-23	54	56	58	56	58	54	53	52	-	-	-	-	-	441
2023-24	45	53	51	56	53	54	42	45	49	-	-	-	-	448
2024-25	54	55	58	56	57	59	69	51	43	-	-	-	-	502

GOAL 1: ENGLISH LANGUAGE ARTS

Bronx Excellence 2 students will become proficient readers and writers of the English language.

BACKGROUND

During the 2024-25 academic year, Bronx Charter School for Excellence 2 implemented its high-quality, comprehensive English Language Arts (ELA) curriculum that is aligned to New York State's Next Generation Learning Standards for K through 8th grades. The reading program provides for students the foundation needed to become proficient readers, including skills and knowledge to understand how phonemes are connected to print; ability to decode words; ability to read fluently; background knowledge and vocabulary to foster comprehension; development of active strategies to construct meaning from print; and development and maintenance of a motivation to read. We chose this curriculum because it allows us to facilitate a literacy approach that incorporates multiple genres, has the flexibility to differentiate, and uses direct instruction to teach foundational skills prior to moving onto more complex content.

The elementary program is grounded in techniques that support explicit and systematic instruction and offers a platform for ongoing professional development for teachers in the critical elements of instruction for phonemic awareness, phonics, fluency, vocabulary, and comprehension strategies. This program is supplemented with guided reading and literature circles based on student learning needs. Students are regularly exposed to authentic texts and provided leveled, guided instruction. Teachers use multiple levels of Bloom's Taxonomy question stems to promote critical thinking. All instructional staff participate in workshops and ongoing modeling throughout the academic year to enhance their skills and optimize their use of curriculum resources.

The middle school program continues this work as scholars progress into departmentalized instruction. Ninety minutes are allocated for ELA each day, with a minimum of 50 minutes devoted to reading using a published program in concert with award winning novels. The program provides a wide variety of genres, word study/vocabulary enrichment, differentiated material, and connections to writing. In addition, each unit begins with essential questions that usher students from knowledge and understanding to synthesis and evaluation. Award-winning novels are directly tied to broader themes taught in other disciplines. Therefore, we can increase reading engagement, stamina, and the connections that allow scholars to make better meaning and sense of the world around them.

Bronx Excellence 2 utilizes the writing workshop model for scholars to experience processed and craft writing. Students improve writing fluency; learn to communicate effectively; develop knowledge of the English written language system, with an emphasis on syntax and discourse; understand the connections between reading and writing to develop writers; understand and can write across various fictional and non-fictional genres; and develop a love of writing, culminating in publishing parties where written work is celebrated.

The implementation of our reading program is effective because of the instructional strategy of uninterrupted, consistent, daily flexible reading groups that focus supports within smaller groups for

struggling readers while offering enrichment activities for students who are proficient and advanced readers. Scholars receive small group instruction and interventions that cross grade-level classrooms. Teachers gather extensive assessment data to determine students' learning levels and provide individualized support to target needs. Assessments include a combination of formal and informal measures such as daily checks and anecdotes; quarterly benchmarks tests; annual state assessments; and curriculum-based assessments administered at the conclusion of the six– to eight-day instructional cycle. All data is used to inform lesson planning, establish targeted small group mini lessons, monitor progress, and evaluate the efficacy of our programming. Moreover, it helps to drive differentiated professional development by strengthening areas of vulnerability and leveraging assets to optimize instruction.

ELEMENTARY AND MIDDLE ELA

ELA Measure 1 - Absolute

Each year, 75 percent of all tested students enrolled in at least their second year will perform at or above proficiency on the New York State English language arts examination for grades 3-8.

The tables below summarize the participation information for this year's test administration as well as the performance of all students and students enrolled for at least two years.

2024-25 State English Language Arts Exam
Number of Students Tested and Not Tested

Grade	Total Tested	Not Tested						Total Enrolled
		Absent	Refusal	ELL/IEP	Admin error	Medically excused	Other reason	
3	55	-	1	-	-	-	1	57
4	56	-	2	-	-	-	-	58
5	58	-	1	-	-	-	-	59
6	69	-	-	-	-	-	-	69
7	49	2	-	-	-	-	-	51
8	43	-	-	-	-	-	-	43
All	330	2	4	-	-	-	1	337

Performance on 2024-25 State English Language Arts Exam
By All Students and Students Enrolled in At Least Their Second Year[1]

Grade	All Students	Enrolled in at least their Second Year

[1] Students are considered "enrolled in at least their second year" if they were enrolled on BEDS day of the school year prior to the most recent exam administration.

	Number Tested	Number Proficient	Percent Proficient	Number Tested	Number Proficient	Percent Proficient
3	55	52	94.55%	38	36	94.74%
4	56	51	91.07%	50	46	92.00%
5	58	51	87.93%	50	46	92.00%
6	69	63	91.30%	61	55	90.16%
7	49	48	97.96%	39	38	97.44%
8	43	40	93.02%	42	39	92.86%
All	330	305	92.42%	280	260	92.86%

ELA Measure 2 - Absolute

Each year, the school's aggregate Performance Index ("PI") on the State English language arts exam will meet that year's state Measure of Interim Progress ("MIP") set forth in the state's ESSA accountability system.

In New York State, ESSA school performance goals are met by showing that an absolute proportion of a school's students who have taken the English language arts test have scored at the partially proficient, or proficient and advanced performance levels (Levels 2 or 3 & 4). The percentage of students at each of these three levels is used to calculate a PI and determine if the school has met the MIP set each year by the state's ESSA accountability system. To achieve this measure, all tested students must have a PI value that equals or exceeds the state's 2024-25 English language arts MIP for all students of **117.3**. The PI is the sum of the percent of students in all tested grades combined scoring at Level 2, plus two times the percent of students scoring at Level 3, plus two-and-a-half times the percent of students scoring at Level 4. Thus, the highest possible PI is 250. [2]

English Language Arts 2024-25 Performance Index (PI)

Number in Cohort	Number of Students at Each Performance Level			
	Level 1	Level 2	Level 3	Level 4
330	3	22	110	195

PI = 0 * 0.91 + 1 * 6.67 + 2 * 33.33 + 2.5 * 59.09 = 221.06

ELA Measure 3 - Comparative

Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state English language arts exam will be greater than that of all students in the same tested grades in the school district of comparison.

[2] You can find the statewide MIP goals for 2022-23 to 2026-27 here

A school compares tested students enrolled in at least their second year to all tested students in the public school district of comparison. Comparisons are between the results for each grade in which the school had tested students in at least their second year at the school and the total result for all students at the corresponding grades in the school district.[3]

2024-25 State English Language Arts Exam
Charter School and District Performance by Grade Level

Grade	Percent of Students at or Above Proficiency			
	Charter School Students In At Least 2nd Year		All District Students	
	Percent Proficient	Number Tested	Percent Proficient	Number Tested
3	94.74%	38	50.86%	978
4	92.00%	50	51.92%	1002
5	92.00%	50	55.73%	1094
6	90.16%	61	44.73%	1005
7	97.44%	39	47.26%	1094
8	92.86%	42	53.58%	1234
All	92.86%	280	50.52%	6407

ELA Measure 4 - Comparative

Each year, the school will exceed its predicted level of performance on the state English language arts exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.

The Institute conducts a Comparative Performance Analysis, which compares the school's performance to that of demographically similar public schools statewide. The Institute uses a regression analysis to control for the percentage of economically disadvantaged students among all public schools in New York State. The difference between the school's actual and predicted performance, relative to other schools with similar economically disadvantaged statistics, produces an Effect Size. An Effect Size of 0.3, or performing higher than expected to a meaningful degree, is the target for this measure. Given the timing of the state's release of economically disadvantaged data and the demands of the data analysis, the 2024-25 analysis is not yet available. This report contains 2023-24 results.[4]

2023-24 English Language Arts Comparative Performance by Grade Level

[3] Schools can access these data when the NYSED releases its database containing grade level ELA and mathematics results for all schools and districts statewide.

[4] These data can be found in the school's Accountability Summary provided by the Institute in spring 2025.

Grade	Percent Economically Disadvantaged	Mean Scale Score		Effect Size
		Actual	Predicted	
3	77.6%	463.0	440.4	2.36
4	90.9%	464.0	438.9	2.33
5	98.2%	456.0	435.6	2.06
6	100%	466.0	436.0	3.40
7	97.8%	466.0	442.4	2.43
8	100%	472.0	442.3	2.83
All	93.6%	464.2	439.3	2.53

ELA Measure 5 - Growth

Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in English language arts for all tested students in grades 4-8 will be above the target of 50.

METHOD

Given the timing of the state's release of Growth Model data, the 2024-25 analysis is not yet available. This report contains 2023-24 results, the most recent Growth Model data available.[5]

This measure examines the change in performance of the same group of students from one year to the next and the progress they are making in comparison to other students with the same score in the previous year. The analysis only includes students who took the state exam in 2023-24 and also have a state exam score from 2022-23 including students who were retained in the same grade. Students with the same 2022-23 score are ranked by their 2023-24 score and assigned a percentile based on their relative growth in performance (student growth percentile). Students' growth percentiles are aggregated school-wide to yield a school's mean growth percentile. In order for a school to perform above the target for this measure, it must have a mean growth percentile greater than 50.

2023-24 English Language Arts Mean Growth Percentile by Grade Level

Grade	Mean Growth Percentile	
	School	Target
4	44.9	50.0
5	48.7	50.0
6	54.6	50.0
7	48.4	50.0
8	52.8	50.0
All	49.7	50.0

[5] These data can be found in the school's Accountability Summary provided by the Institute in spring 2025.

ELA INTERNAL EXAM RESULTS

During 2024-25, in addition to the New York State 3rd – 8th grade exams, the school primarily used the following assessment to measure student growth and achievement in ELA: Internally developed

METHOD

The table below shows the proficiency rates of students at the end of the 2024-25 school year. Because it is assumed that students will grow at the normed rate to master grade level content by the conclusion of the school year, these figures demonstrate the percentage of students in grades 3-8 who mastered 75% or more of grade level content at the normed rate since the beginning of the school year.

End-of-Year Performance of 2024-25 Students from Internal ELA Assessment by Grade Level

Site	Grade	Count of Students	% Proficient
Bronx 2	3	56	85.71%
Bronx 2	4	57	89.47%
Bronx 2	5	59	86.44%
Bronx 2	6	69	88.41%
Bronx 2	7	51	88.24%
Bronx 2	8	43	93.02%
Bronx 2	All	335	88.36%

SUMMARY OF THE ELA GOAL

Bronx Excellence 2 met the ELA goal and met four of five measures, including both absolute measures and both comparative measures, and fell just below the growth measure target.

Type	Measure	Outcome
Absolute	Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State English language arts exam for grades 3-8.	Yes
Absolute	Each year, the school's aggregate PI on the state's English language arts exam will meet that year's state MIP as set forth in the state's ESSA accountability system.	Yes
Comparative	Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state English language arts exam will be greater than that of students in the same tested grades in the school district of comparison.	Yes
Comparative	Each year, the school will exceed its predicted level of performance on the state English language arts exam by an effect size of 0.3 or above	Yes

	(performing higher than expected to a meaningful degree) according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.	
Growth	Each year, under the state's Growth Model the school's mean unadjusted growth percentile in English language arts for all tested students in grades 4-8 will be above the target of 50.	No

EVALUATION OF ELA GOAL

Bronx Excellence 2 exceeded four five measures, outperforming the targets by large margins, and fell slightly below the growth target for the reporting period.

Measure 1 – Absolute: Overall, 92.86% of students enrolled in at least their second year were proficient on the New York State exam for grades 3-8, which greatly exceeds the 75% attainment expectation. Each individual grade surpassed the 75% attainment threshold as well.

Measure 2 – Absolute: The school's performance index was 221.06, which exceeded the achievement measure of 117.3.

Measure 3 – Comparative: Bronx Excellence 1 students enrolled in at least their second year outperformed their district counterparts in each grade and overall. The overall proficiency rate for these continuously enrolled students was 92.86%, compared to 50.52% within the school district of comparison.

Measure 4 – Comparative: Each individual grade surpassed the .3 effect size achievement measure target, and the school's overall effect size was 2.53.

Measure 5 – Growth: The overall MGP reported here fell just short of the target, with a result of 49.7 rather than 50. Grades four, five, and seven were below the target individually and grades six and eight were above the target.

These positive outcomes reflect effective instructional routines and the overall strength of the ELA program in school year 2024-25.

ELA ACTION PLAN

At Bronx Excellence 2, equity remains at the forefront of our mission. We are committed to ensuring that every scholar has access to high-quality instruction that allows them to thrive academically and as independent thinkers. During the 2025-26 school year, our English Language Arts priorities will center on strengthening teacher development, deepening data-driven practices, implementing targeted interventions, and elevating the quality of student writing through the systematic use of The Writing Revolution. Teachers will engage in collaborative lesson planning aligned to the Next Generation Standards and will participate in regular data cycles to analyze results, identify misconceptions, and adjust instruction accordingly. These cycles will also inform targeted interventions for all levels of readers and writers, monitored weekly with clear entry and exit criteria.

Writing will remain a schoolwide priority as we aim to ensure scholars develop into proficient, independent communicators. Teachers will analyze student work regularly to track growth and implement Writing Revolution strategies with fidelity. Instruction will emphasize sentence expansion and structure, note-taking and summarization, evidence-based writing across subject areas, and scaffolded tasks that build from sentences to multi-paragraph essays. Teachers will set growth goals aligned to the Next Generation Standards and monitor progress using writing portfolios, rubrics, and interim assessments.

Professional development will continue to be a driving force for teacher growth. Our PD cycles will focus on the Next Generation Standards, emphasizing reading, writing, and language with attention to key ideas and details, craft and structure, integration of knowledge and ideas, and vocabulary development. Teachers will also receive training on Writing Revolution strategies, student work protocols, designing responsive interventions, and differentiating instruction for English Learners, scholars with disabilities, and advanced students. This commitment to professional learning will ensure that instruction is rigorous, equitable, and responsive to the diverse needs of all scholars.

Instructional practices and progress monitoring will reflect these priorities in daily classrooms. Reading instruction will combine whole-group instruction with flexible small groups, while writing tasks will be embedded consistently across content areas. Teachers will use formative assessments such as exit tickets, frequent checks for understanding, and student work analysis to guide instruction. Benchmark assessments and weekly data meetings will ensure ongoing progress monitoring, while writing portfolios will showcase scholar growth over time. By June 2026, we expect 100% of teachers to demonstrate measurable growth in planning, data use, and intervention implementation, and at least 75% of scholars to meet or exceed grade-level writing expectations. Ultimately, Bronx Excellence 2 will strengthen its culture of literacy and ensure all scholars can communicate their ideas with clarity, evidence, and confidence.

GOAL 2: MATHEMATICS

Bronx Excellence 2 students will demonstrate steady progress in the understanding and application of mathematical skills.

BACKGROUND

Bronx Excellence 2 uses Next Generation math standards and Eureka Squared sequences mathematical progressions into modules. The curriculum aligns well with the school's approach to learning and provides a foundation of knowledge, skills, and competencies upon which to build as students advance in content and grade level. We selected this curricular approach because it allows students to engage with exciting, intriguing, and animated content that provides enhanced opportunities to explore, expand upon, and broaden the depth of mathematical discourse, real-world connections, reasoning, critical thinking, and problem solving. This includes computational, procedural, and conceptual knowledge that supports and builds success in mathematics with authentic problem solving. The program centers on teaching with a concrete-pictorial-abstract learning progression through real-world, hands-on

experiences. It encourages students to use various mental strategies to solve problems and focus on finding solutions. It builds conceptual understanding rather than rote memorization, with an emphasis on critical thinking and problem solving and focuses on deep knowledge building to understand mathematics conceptually.

Our math program also uses key concepts as building blocks for more complex treatments in articulated, logical, modular progressions using a narrative approach to build coherence. Students are encouraged to use math talk to build mathematical vocabulary to discuss concepts in context. Scholars are expected to learn content and processes of mathematics to become lifelong mathematical thinkers. Middle school students continue to work with the standards-aligned, coherent, and focused curriculum that reflects the logical and sequential nature of mathematics. The curriculum simultaneously develops conceptual understanding, computational fluency, and problem-solving skills within real-world context. Our program is research-based and provides robust professional development for teachers, inclusive of teacher-led instructional videos and tools to target instruction based on student need.

Math is taught daily for a minimum of 60 minutes for elementary school and 90 minutes for middle school. During the class, content is introduced to the whole group. The teacher uses real-time data collected throughout the lesson, such as checks for understanding or questioning methods, along with unit quizzes and tests, and informal performance assessments. Additional assessments include formal and informal measures such as exit tickets, performance tasks, interim and state exams, and unit quizzes and tests. Data garnered from these measures is used to formulate small group interventions, assess curriculum efficacy, inform lesson planning, and guide professional development.

Based on classroom data, teachers provide scaffolded small groups and individualized targeted instruction as students practice work independently. This way, interventions are provided in real time, particularly for scholars who are not immediately mastering content. Our program also allows differentiation with advanced sections and groups created to enrich the math experience for scholars who are accelerated. While scholars are expected to master both content and mathematical processes appropriate for their age and grade, our goal is to support scholars so they can complete Algebra by the end of eighth grade.

ELEMENTARY AND MIDDLE MATHEMATICS

Math Measure 1 - Absolute

Each year, 75 percent of all tested students enrolled in at least their second year will perform at or above proficiency on the New York State Mathematics examination for grades 3-8.

The tables below summarize the participation information for this year's test administration as well as the performance of all students and students enrolled for at least two years.

2024-25 State Mathematics Exam
Number of Students Tested and Not Tested

Grade	Total Tested	Not Tested							Total Enrolled
		Absent	Refusal	ELL/IEP	Admin error	Medically excused	Other reason	Took Regents	
3	55	-	1	-	-	-	1	-	57
4	57	-	1	-	-	-	-	-	58
5	58	-	1	-	-	-	-	-	59
6	69	-	-	-	-	-	-	-	69
7	51	-	-	-	-	-	-	-	51
8	43	-	-	-	-	-	-	14	43
All	333	-	3	-	-	-	1	14	337

Performance on 2024-25 State Mathematics Exam
By All Students and Students Enrolled in At Least Their Second Year

Grade	All Students			Enrolled in at least their Second Year		
	Number Tested	Number Proficient	Percent Proficient	Number Tested	Number Proficient	Percent Proficient
3	55	54	98.18%	38	38	100.00%
4	57	56	98.25%	51	50	98.04%
5	58	53	91.38%	50	46	92.00%
6	69	64	92.75%	61	56	91.80%
7	51	50	98.04%	41	41	100.00%
8	43	41	95.35%	42	40	95.24%
All	333	318	95.50%	283	271	95.76%

Additionally, 100% of the Bronx Excellence 2 students who took a Regents exam in mathematics achieved proficiency.

Math Measure 2 - Absolute

Each year, the school's aggregate Performance Index ("PI") on the state mathematics exam will meet that year's state Measure of Interim Progress ("MIP") set forth in the state's ESSA accountability system.

METHOD

In New York State, ESSA school performance goals are met by showing that an absolute proportion of a school's students who have taken the mathematics test have scored at the partially proficient, or proficient and advanced performance levels (Levels 2 or 3 & 4). The percentage of students at each of these three levels is used to calculate a PI and determine if the school has met the MIP set each year by the state's ESSA accountability system. To achieve this measure, all tested students must have a PI value that equals or exceeds the state's 2024-25 mathematics MIP for all students of **119.4**. The PI is the

sum of the percent of students in all tested grades combined scoring at Level 2, plus two times the percent of students scoring at Level 3, plus two-and-a-half times the percent of students scoring at Level 4. Thus, the highest possible PI is 250.

Mathematics 2024-25 Performance Index (PI)

Number in Cohort	Number of Students at Each Performance Level			
	Level 1	Level 2	Level 3	Level 4
333	2	13	120	198

PI = 0 * 0.60 + 1 * 3.90 + 2 * 36.04 + 2.5 * 59.46 = 224.62

Math Measure 3 - Comparative

Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state mathematics exam will be greater than that of all students in the same tested grades in the school district of comparison.

METHOD

A school compares tested students enrolled in at least their second year to all tested students in the public school district of comparison. Comparisons are between the results for each grade in which the school had tested students in at least their second year at the school and the total result for all students at the corresponding grades in the school district.

2024-25 State Mathematics Exam
Charter School and District Performance by Grade Level

Grade	Percent of Students at or Above Proficiency			
	Charter School Students In At Least 2nd Year		All District Students	
	Percent Proficient	Number Tested	Percent Proficient	Number Tested
3	100.00%	38	58.74%	1990
4	98.04%	51	55.37%	1992
5	92.00%	50	50.20%	1986
6	91.80%	61	40.29%	2301
7	100.00%	41	51.79%	2319
8	95.24%	42	47.14%	980
All	95.76%	283	50.65%	11568

Math Measure 4 - Comparative

Each year, the school will exceed its predicted level of performance on the state mathematics exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree)

according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.

METHOD

The Institute conducts a Comparative Performance Analysis, which compares the school's performance to that of demographically similar public schools statewide. The Institute uses a regression analysis to control for the percentage of economically disadvantaged students among all public schools in New York State. The difference between the school's actual and predicted performance, relative to other schools with similar economically disadvantaged statistics, produces an Effect Size. An Effect Size of 0.3, or performing higher than expected to a meaningful degree, is the target for this measure. Given the timing of the state's release of economically disadvantaged data and the demands of the data analysis, the 2024-25 analysis is not yet available. This report contains 2023-24 results.[6]

2023-24 Mathematics Comparative Performance by Grade Level

Grade	Percent Economically Disadvantaged	Mean Scale Score		Effect Size
		Actual	Predicted	
3	77.6%	470.0	447.6	1.75
4	90.9%	487.0	447.0	2.54
5	98.2%	478.0	440.1	2.82
6	100%	477.0	440.1	3.09
7	97.8%	495.0	445.9	3.64
8	100%	500.0	440.0	3.44
All	93.6%	484.5	443.6	2.84

Math Measure 5 - Growth

Each year, under the state's Growth Model, the school's mean unadjusted growth percentile in mathematics for all tested students in grades 4-8 will be above the target of 50.

METHOD

Given the timing of the state's release of Growth Model data, the 2024-25 analysis is not yet available. This report contains 2023-24 results, the most recent Growth Model data available.[7]

This measure examines the change in performance of the same group of students from one year to the next and the progress they are making in comparison to other students with the same score in the previous year. The analysis only includes students who took the state exam in 2023-24 and also have a

[6] These data can be found in the school's Accountability Summary provided by the Institute in spring 2025.

[7] These data can be found in the school's Accountability Summary provided by the Institute in spring 2025.

state exam score in 2022-23 including students who were retained in the same grade. Students with the same 2022-23 scores are ranked by their 2023-24 scores and assigned a percentile based on their relative growth in performance (student growth percentile). Students' growth percentiles are aggregated school-wide to yield a school's mean growth percentile. In order for a school to meet the measure, the school would have to achieve a mean growth percentile above the target of 50.

2023-24 Mathematics Mean Growth Percentile by Grade Level

Grade	Mean Growth Percentile	
	School	Target
4	55.0	50.0
5	55.9	50.0
6	51.1	50.0
7	61.9	50.0
8	73.4	50.0
All	59.5	50.0

MATHEMATICS INTERNAL EXAM RESULTS

During 2024-25, in addition to the New York State 3rd – 8th grade exams, the school primarily used the following assessment to measure student growth and achievement in mathematics: Internally developed

METHOD

The table below shows the proficiency rates of students at the end of the 2024-25 school year. Because it is assumed that students will grow at the normed rate to master grade level content by the conclusion of the school year, these figures demonstrate the percentage of students in grades 3-8 who mastered 75% or more of grade level content at the normed rate since the beginning of the school year.

RESULTS AND EVALUATION

End-of-Year Performance of 2024-25 Students from Internal Math Assessment by Grade Level

Site	Grade	Count of Students	% Proficient
Bronx 2	3	56	89.29%
Bronx 2	4	57	91.23%
Bronx 2	5	59	86.44%
Bronx 2	6	69	85.51%
Bronx 2	7	51	90.20%
Bronx 2	8	43	86.05%
Bronx 2	All	335	88.06%

SUMMARY OF THE MATHEMATICS GOAL

Bronx Excellence 2 met each of the five measures, exceeding the targets by wide margins and meeting the mathematics goal.

Type	Measure	Outcome
Absolute	Each year, 75 percent of all tested students who are enrolled in at least their second year will perform at proficiency on the New York State Mathematics exam for grades 3-8.	Yes
Absolute	Each year, the school's aggregate PI on the state's mathematics exam will meet that year's state MIP as set forth in the state's ESSA accountability system.	Yes
Comparative	Each year, the percent of all tested students who are enrolled in at least their second year and performing at proficiency on the state mathematics exam will be greater than that of students in the same tested grades in the school district of comparison.	Yes
Comparative	Each year, the school will exceed its predicted level of performance on the state mathematics exam by an effect size of 0.3 or above (performing higher than expected to a meaningful degree) according to a regression analysis controlling for economically disadvantaged students among all public schools in New York State.	Yes
Growth	Each year, under the state's Growth Model the school's mean unadjusted growth percentile in mathematics for all tested students in grades 4-8 will be above the target of 50.	Yes

EVALUATION OF THE MATHEMATICS GOAL

Bronx Excellence 2 met each of the five measures and met the mathematics goal for the year, surpassing the target for each measure by a large margin.

Measure 1 – Absolute: Overall, 95.76% of students enrolled in at least their second year were proficient on the New York State math exam for grades 3-8, far surpassing the 75% attainment expectation. Notably, continuously enrolled students in grades three and seven achieved 100% proficiency.

Measure 2 – Absolute: The school's performance index was 224.62, which exceeded the achievement measure of 119.4.

Measure 3 – Comparative: Bronx Excellence 2 students enrolled in at least their second year outperformed their district counterparts in each grade and overall. The overall proficiency rate for these continuously enrolled students was 95.76%, compared to 50.65% within the school district of comparison.

Measure 4 – Comparative: Each individual grade surpassed the .3 effect size achievement measure target, and the overall effect size for the school was 2.84.

Measure 5 – Growth: The school's overall MGP was 59.5, surpassing the target of 50.

These positive outcomes reflect effective instructional routines and the overall strength of the mathematics program in school year 2024-25.

MATHEMATICS ACTION PLAN

At Bronx Excellence 2, equity continues to guide our mission to ensure that every scholar has access to high-quality math instruction. To address unfinished learning from the pandemic, we will build upon practices that have proven successful while expanding resources and scaffolding capacity. Teachers will rely on a data-driven approach to assess each scholar's needs and create individualized intervention plans. Support will be provided through small-group instruction, one-to-one tutoring, individualized services, and summer programming. This comprehensive approach ensures that all scholars, including English Learners and students with disabilities, have equitable opportunities to master math content and skills.

Last year, Bronx Excellence 2 prioritized building strong foundational math skills to strengthen number sense and fluency. This year, we will continue that focus while deepening teacher development in effective planning, responding to data, and fostering scholar independence. Teachers will be trained to encourage students to explain their reasoning, show multiple strategies, and self-monitor progress. Instruction will leverage flexible small groups and manipulatives to make abstract concepts more concrete, ensuring that all scholars can access rigorous, grade-level content.

Professional development will remain central to strengthening teacher practice. Teachers will engage in collaborative planning with leadership and peers, participate in co-teaching and modeling cycles with ECS coaches, and use student work protocols to calibrate expectations across grade levels. PD will emphasize differentiation strategies, embedding math discourse, strengthening use of manipulatives, and facilitating productive struggle. By equipping teachers with these tools, we will ensure instruction is both rigorous and responsive to scholar needs.

Daily classroom practice will reflect these priorities through whole-group instruction paired with differentiated small groups, math messages embedded into morning meetings, and rich opportunities for problem-solving and projects. Progress will be monitored through benchmark assessments, frequent formative checks, and early intervention systems that track short-term goals. Weekly and quarterly data meetings will ensure instruction is continuously adjusted based on student performance. By June 2026, we expect 100% of teachers to demonstrate measurable growth in planning, differentiation, and use of small groups, and 100% of scholars to show growth in foundational math skills. At least 75% of scholars will meet or exceed grade-level expectations, ensuring that all students are prepared to advance with confidence and independence in mathematics.

GOAL 3: SCIENCE

Students will demonstrate proficiency relative to science achievement and use technology, scientific concepts, principles, and theories to conduct and analyze investigations.

BACKGROUND

The science curriculum is based on the New York State P-12 Science Learning Standards (NYSP-12SLS) and focuses on three dimensions of learning – Science and Engineering Practices, Disciplinary Core Ideas, and Crosscutting Concepts. Under the guidance of the standards, the science program takes an inquiry-based approach to learning. It provides students with opportunities to build connections that link science to technology and societal impacts and provides the skills and knowledge our students need to become scientifically literate citizens of the 21st century. This approach aligns to our commitment to inspire conscientious, inquisitive, knowledgeable, and lifelong scholars. Students practice solving problems creatively, thinking critically, working cooperatively in teams, using technology effectively, and developing positive science attitudes.

Science instruction at Bronx Excellence 2 is differentiated for all learning styles and incorporates several methods of instructional delivery and assessment. Instruction emphasizes active, hands-on explorations in the early grades that help students build their understanding of key concepts. It invites students to develop and explain concepts in their own words orally, through writing, and drawing. Students are provided with options and projects that allow them to demonstrate mastery of content. Young learners are encouraged to actively explore, discover, and learn about the natural world.

The middle school science program is also governed by the NYSP-12SLS. Key ideas and performance indicators are used to prepare our students to further develop and cultivate science abilities and understanding. Guided by teachers, students continually learn content to complete hands-on scientific investigations, blended with literacy-rich activities and interactive digital tools. They also learn to develop hypotheses and provide reasoning using evidence. With practice, trial, and error, students in grades 5-8 demonstrate their understanding of scientific processes, skills, and procedures. Bronx 2 scholars also learned about cultivating a hydroponic lab and eighth graders will be able to take an advanced high school course of living environment and participate in Urban Advantage, an initiative designed to advance scientific learning in New York City. Varied opportunities allow students to demonstrate appropriate scientific language, procedures, and proficiency, culminating in the state examinations. Assessments include classroom assignments, discourse, experiments, quizzes and tests, and presentations. Data is used to inform instruction, evaluate program efficacy and differentiate professional development.

ELEMENTARY AND MIDDLE SCIENCE

Science Measure 1 - Absolute

Each year, 75 percent of all tested students enrolled in at least their second year will perform at or above proficiency on the New York State science examination.

The school administered the New York State Testing Program science assessment to students in 5th and 8th grade in spring 2025. The table below summarizes the performance of students enrolled for at least two years.

Charter School Performance on 2024-25 State Science Exam By Students Enrolled in At Least Their Second Year			
Grade	Students in At Least Their 2nd Year		
	Number Tested	Number Proficient	Percent Proficient
5	49	35	71.43%
8	41	34	82.93%
All	90	69	76.67%

Science Measure 2 - Comparative

Each year, the percent of all tested students enrolled in at least their second year and performing at proficiency on the state science exam will be greater than that of all students in the same tested grades in the school district of comparison.

The school compares tested students enrolled in at least their second year to all tested students in the public school district of comparison. Comparisons are between the results for each grade in which the school had tested students in at least their second year and the results for the respective grades in the school district of comparison.

2024-25 State Science Exam Charter School and District Performance by Grade Level						
	Charter School Students in at Least 2nd Year			All District Students		
Grade	Number Tested	Number Proficient	Percent Proficient	Number Tested	Number Proficient	Percent Proficient
5	49	35	71.43%	2257	569	25%
8	41	34	82.93%	1152	302	26%
All	90	69	76.67%	3409	871	25%

SUMMARY OF THE ELEMENTARY/MIDDLE SCIENCE GOAL

Bronx Excellence 2 met the science goal and exceeded the target for both measures.

Type	Measure	Outcome
Absolute	Each year, 75 percent of all tested students enrolled in at least their second year will perform at proficiency on the New York State examination.	Yes
Comparative	Each year, the percent of all tested students enrolled in at least their second year and performing at proficiency on the state exam will be greater than that of all students in the same tested grades in the school district of comparison.	Yes

EVALUATION OF THE SCIENCE GOAL

Bronx Excellence 2 met the science goal and surpassed attainment targets for each individual measure. The school's overall proficiency rate for students enrolled in at least their second year was 76.67% overall, with students in both fifth and eighth grades exceeding the 75% target. Students vastly exceeded the performance of their district peers, with only a quarter of students proficient at the district of comparison. Additionally, some Bronx Excellence 2 students took the Living Environment Regents exam in 2024-25, with a passage rate of 100%.

Performance on a Regents Science Exam
Of 8th Grade All Students by Year

Grade	Year	Regents Exam	Number Tested	Number Passing	Percent Passing
8	2022-23	-	-	-	-
8	2023-24	-	-	-	-
8	2024-25	Living Environment	9	9	100%

ACTION PLAN

Bronx Excellence 2 will continue to pursue a comprehensive approach to evaluating student instructional needs through the systematic administration of multiple benchmark assessments that capture formative and summative data at regular intervals. Assessments will inform robust data-driven differentiation strategies that precisely target and accelerate academic growth in science. The school's learning environment prioritizes equitable access to high-quality, standards-based instruction, with intentional scaffolding and supports embedded to address the needs of students with disabilities and English Learners.

Guided by the principles of Next Generation Science Standards (NGSS) and the Amplify Science curriculum, Bronx Excellence 2 empowers students to engage as scientists and engineers through authentic, phenomena-based inquiries. The Amplify Science curriculum integrates the three-dimensional learning framework of the Next Generation Science Standards (NGSS), ensuring students build disciplinary core ideas, science and engineering practices, and crosscutting concepts across multimodal lessons that promote critical thinking, scientific argumentation, and problem solving.

Professional learning for science educators is strategically aligned to the NGSS and the Amplify Science curriculum's research-based pedagogies. This includes deep-dive unit workshops, job-embedded coaching, and ongoing data analysis to strengthen teacher capacity for evidence-based instruction and differentiated support for diverse learners. Through these structures, Bronx Excellence 2 ensures sustained fidelity to curricular rigor while continuously monitoring learner outcomes and instructional efficacy.

GOAL 4: ESSA

ESSA Measure 1

Under the state's ESSA accountability system, the school is in good standing: the state has not identified the school for comprehensive or targeted improvement.

Because *all* students are expected to meet the state's performance standards, the federal statute stipulates that various sub-populations and demographic categories of students among all tested students must meet the state standard in and of themselves aside from the overall school results. As New York State, like all states, is required to establish a specific system for making these determinations for its public schools, charter schools do not have latitude in establishing their own performance levels or criteria of success for meeting the ESSA accountability requirements. Each year, the state issues School Report Cards that indicate a school's status under the state accountability system. More information on assigned accountability designations and context can be found here.

Accountability Status by Year

Year	Status
2022-23	Local Support and Improvement (Good Standing)
2023-24	Local Support and Improvement (Good Standing)
2024-25	Local Support and Improvement (Good Standing)

ADDITIONAL CONTEXT AND EVIDENCE

Bronx Excellence 2 has remained in good standing and has met this goal every year of reporting.

BRONX CHARTER SCHOOL FOR EXCELLENCE

BRONX, NEW YORK

AUDITED FINANCIAL STATEMENTS

REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS

OTHER FINANCIAL INFORMATION

AND

INDEPENDENT AUDITOR'S REPORTS

JUNE 30, 2025
(With Comparative Totals for 2024)

MMB+CO | BUSINESS ADVISORS AND CPAS

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INDEPENDENT AUDITOR'S REPORT

Board of Trustees
Bronx Charter School for Excellence

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of Bronx Charter School for Excellence which comprise the statement of financial position as of June 30, 2025, and the related statements of activities and changes in net assets, functional expenses and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of Bronx Charter School for Excellence as of June 30, 2025, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in the *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Bronx Charter School for Excellence and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Bronx Charter School for Excellence's ability to continue as a going concern for one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Bronx Charter School for Excellence's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Bronx Charter School for Excellence's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control–related matters that we identified during the audit.

Report on Summarized Comparative Information

We have previously audited the Bronx Charter School for Excellence's June 30, 2024 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated October 28, 2024. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2024 is consistent, in all material respects, with the audited financial statements from which it has been derived.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated October 24, 2025 on our consideration of Bronx Charter School for Excellence's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Bronx Charter School for Excellence's internal control over financial reporting and compliance.

Mengel, Metzger, Barr & Co. LLP

Rochester, New York
October 24, 2025

WE VALUE YOUR FUTURE

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FINANCIAL POSITION

JUNE 30, 2025
(With Comparative Totals for 2024)

ASSETS	June 30, 2025	June 30, 2024
CURRENT ASSETS		
Cash and cash equivalents	$ 20,440,623	$ 7,351,922
Grants and contracts receivable	1,830,987	9,193,802
Investments	22,202,827	21,200,467
Prepaid expenses	714,633	781,316
Due from related parties	269,763	73,612
TOTAL CURRENT ASSETS	45,458,833	38,601,119
PROPERTY AND EQUIPMENT, net	29,940,857	31,179,606
OTHER ASSETS		
Right-of-use assets - operating	101,953,328	95,380,725
Cash in escrow	225,000	225,000
Security deposits	795,300	741,800
	102,973,628	96,347,525
TOTAL ASSETS	$ 178,373,318	$ 166,128,250
LIABILITIES AND NET ASSETS		
CURRENT LIABILITIES		
Current portion of lease liabilities - operating	$ 4,242,034	$ 3,191,533
Accounts payable	794,803	526,991
Accrued expenses	544,543	198,926
Accrued payroll and benefits	4,974,078	5,349,004
Deferred revenue	2,992	7,206
Management fees due to charter management organization	1,456,389	1,843,197
TOTAL CURRENT LIABILITIES	12,014,839	11,116,857
OTHER LIABILITIES		
Long-term lease liabilities - operating	104,499,675	97,562,921
TOTAL LIABILITIES	116,514,514	108,679,778
NET ASSETS, without donor restrictions	61,858,804	57,448,472
TOTAL LIABILITIES AND NET ASSETS	$ 178,373,318	$ 166,128,250

The accompanying notes are an integral part of the financial statements.

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,	
	2025	2024
Revenue, gains and other support:		
Public school district:		
Resident student enrollment	$ 48,724,186	$ 41,763,866
Students with disabilities	396,064	1,880,693
Grants and contracts:		
State and local	182,086	174,421
Federal - Title and IDEA	2,139,560	1,895,766
Federal - other	333,929	5,110,644
Food Service/Child Nutrition Program	1,392,651	1,326,320
NYC DoE Rental Assistance	7,204,897	6,319,191
TOTAL REVENUE, GAINS AND OTHER SUPPORT	60,373,373	58,470,901
Expenses:		
Program:		
Regular education	44,732,011	41,901,575
Special education	8,339,494	7,889,410
Management and general	4,047,298	3,672,588
TOTAL OPERATING EXPENSES	57,118,803	53,463,573
SURPLUS FROM SCHOOL OPERATIONS	3,254,570	5,007,328
Support and other revenue:		
Contributions:		
Foundations	2,800	139,002
Corporations	3,200	3,619
Investment income	1,149,233	876,846
Miscellaneous income	529	203,929
TOTAL SUPPORT AND OTHER REVENUE	1,155,762	1,223,396
CHANGE IN NET ASSETS	4,410,332	6,230,724
Net assets at beginning of year	57,448,472	51,217,748
NET ASSETS AT END OF YEAR	$ 61,858,804	$ 57,448,472

The accompanying notes are an integral part of the financial statements.

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

		Year ended June 30,					
		2025					2024
		Program Services			Supporting Services		
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total	Total
Personnel Services Costs:							
Administrative staff personnel	65	$ 3,707,739	$ 1,235,911	$ 4,943,650	$ 1,235,911	$ 6,179,561	$ 5,709,485
Instructional personnel	167	14,014,369	2,153,109	16,167,478	120,882	16,288,360	16,032,292
Non-instructional personnel	21	573,089	191,030	764,119	191,030	955,149	438,463
Total salaries and wages	253	18,295,197	3,580,050	21,875,247	1,547,823	23,423,070	22,180,240
Payroll taxes and employee benefits		3,151,387	614,802	3,766,189	267,630	4,033,819	3,720,010
Retirement		517,954	101,527	619,481	43,844	663,325	489,044
Management fees		7,071,604	1,381,236	8,452,840	598,216	9,051,056	8,769,200
Legal fees		-	-	-	16,874	16,874	60,461
Audit/accounting fees		-	-	-	57,651	57,651	67,093
Professional services		2,800,374	370,028	3,170,402	299,234	3,469,636	2,781,257
Building and land rent		6,670,998	1,399,777	8,070,775	548,407	8,619,182	7,940,814
Repairs and maintenance		329,072	55,736	384,808	29,678	414,486	316,526
Insurance		-	-	-	291,403	291,403	251,528
Utilities		316,179	53,502	369,681	28,532	398,213	503,377
Curriculum and classroom supplies		1,278,145	124,199	1,402,344	-	1,402,344	1,522,065
Non-capitalized equipment and furnishings		202,669	35,761	238,430	15,698	254,128	329,166
Professional development		239,191	45,254	284,445	20,611	305,056	210,474
Student and staff recruitment		213,908	37,283	251,191	14,936	266,127	277,738
Technology		435,751	84,670	520,421	35,878	556,299	316,284
Food service		1,367,028	135,014	1,502,042	-	1,502,042	1,449,924
Student services		108,391	10,310	118,701	-	118,701	68,178
Office expenses		242,016	46,729	288,745	20,960	309,705	290,715
Interest expense		-	-	-	-	-	1,238
Depreciation and amortization		1,477,376	261,293	1,738,669	130,243	1,868,912	1,831,758
Other		14,771	2,323	17,094	79,680	96,774	86,483
		$ 44,732,011	$ 8,339,494	$ 53,071,505	$ 4,047,298	$ 57,118,803	$ 53,463,573

The accompanying notes are an integral part of the financial statements.

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF CASH FLOWS

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,	
	2025	2024
CASH FLOWS - OPERATING ACTIVITIES		
Change in net assets	$ 4,410,332	$ 6,230,724
Adjustments to reconcile change in net assets to net cash provided from operating activities:		
Depreciation and amortization	1,868,912	1,831,758
Changes in certain assets and liabilities affecting operations:		
Grants and contracts receivable	7,362,815	(3,847,008)
Prepaid expenses	66,683	52,199
Due from related parties	(196,151)	(26,218)
Accounts payable	267,812	(357,605)
Accrued expenses	345,617	137,616
Accrued payroll and benefits	(374,926)	572,087
Deferred revenue	(4,214)	(340)
Management fees due to charter management organization	(386,808)	(157,167)
Operating lease liabilities, net of right-of-use assets	1,414,652	1,685,668
NET CASH PROVIDED FROM OPERATING ACTIVITIES	14,774,724	6,121,714
CASH FLOWS - INVESTING ACTIVITIES		
Purchases of property and equipment	(630,163)	(490,527)
Security deposits	(53,500)	(50)
Purchases of investments	(1,002,360)	(5,871,519)
NET CASH USED FOR INVESTING ACTIVITIES	(1,686,023)	(6,362,096)
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS AND RESTRICTED CASH	13,088,701	(240,382)
Cash and cash equivalents and restricted cash at beginning of year	7,576,922	7,817,304
CASH AND CASH EQUIVALENTS AND RESTRICTED CASH AT END OF YEAR	$ 20,665,623	$ 7,576,922

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF CASH FLOWS, Cont'd

YEAR ENDED JUNE 30, 2025
(With Comparative Totals for 2024)

	Year ended June 30,	
	2025	2024
SUPPLEMENTAL DISCLOSURE OF CASH FLOW INFORMATION		
Cash paid during the year for interest	$ -	$ 1,236
NON-CASH OPERATING AND INVESTING ACTIVITIES		
Purchases of property and equipment included in accounts payable	$ -	$ 18,464
Right-of-use assets obtained in exchange for new lease liabilities	$ 11,764,835	$ 348,939
Reconciliation of cash and cash equivalents and restricted cash reported within the statement of financial position that sum to the total amounts shown in the statement of cash flows:		
Cash and cash equivalents	$ 20,440,623	$ 7,351,922
Cash in escrow	225,000	225,000
	$ 20,665,623	$ 7,576,922

The accompanying notes are an integral part of the financial statements.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The Charter School

Bronx Charter School for Excellence (the "Charter School") is an educational corporation operating as a charter school in the borough of the Bronx, New York. On April 29, 2003, the Board of Regents of the University of the State of New York granted Bronx Charter School for Excellence ("Bronx Excellence 1") a provisional charter valid for a term of five years and renewable upon expiration. Bronx Excellence 1 was established to prepare young people from New York City to compete for admission to, and succeed in, top public, private and parochial schools by cultivating their intellectual, artistic, social, emotional, and ethical development. Bronx Excellence 1 offers a challenging and rigorous academic curriculum which, at the earliest of grades, has an eye towards college preparation for students in kindergarten through 8th grade.

On November 2, 2015, the Board of Regents of the University of the State of New York amended the charter agreement permitting an additional school to be opened by the Charter School. During the 2016 fiscal year, the Charter School added Bronx Charter School for Excellence 2 ("Bronx Excellence 2") under its expanded charter. Bronx Excellence 2 was established to provide its students with a solid foundation for academic success, through achievement that exceeds citywide averages and meets or exceeds New York State Standards and national norms in all curriculum areas tested, especially in mathematics and language arts.

On March 24, 2017, the Board of Regents of the University of the State of New York amended the charter agreement permitting an additional 3 schools to be opened by the Charter School, Bronx Charter School for Excellence 3, 4, and 5. Bronx Excellence 3 opened in September 2017. Bronx Excellence 4 opened in September 2018. Bronx Excellence 5 opened in September 2019. These charter schools were established to provide its students with a solid foundation for academic success, through achievement that exceeds citywide averages and meets or exceeds New York State Standards and national norms in all curriculum areas tested, especially in mathematics and language arts.

On March 27, 2024, the Board of Regents of the University of the State of New York extended the provisional charter for a term of five years, aligning all charters through July 31, 2029.

The accompanying financial statements include the accounts of Bronx Excellence 1, Bronx Excellence 2, Bronx Excellence 3, Bronx Excellence 4 and Bronx Excellence 5 (collectively referred to as the "Charter School"). All intercompany balances and transactions have been eliminated in the accompanying financial statements.

Basis of accounting

The accompanying financial statements have been prepared in accordance with accounting principles generally accepted in the United States of America.

Classification of net assets

To ensure observance of limitations and restrictions placed on the use of resources available to the Charter School, the accounts of the Charter School are maintained in accordance with the principles of accounting for not-for-profit organizations. This is the procedure by which resources are classified for reporting purposes into net asset groups, established according to their nature and purpose. Accordingly, all financial transactions have been recorded and reported by net asset group.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

The assets, liabilities, activities, and net assets are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions
Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions. The Board of Trustees has discretionary control to use these in carrying on operations in accordance with the guidelines established by the Charter School.

Net Assets With Donor Restrictions
Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both. The Charter School had no net assets with donor restrictions at June 30, 2025 or 2024.

Revenue and support recognition
Revenue from Exchange Transactions: The Charter School recognizes revenue in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) 2014-09, Revenue from Contracts with Customers, as amended. ASU 2014-09 applies to exchange transactions with customers that are bound by contracts or similar arrangements and establishes a performance obligation approach to revenue recognition.

The Charter School records substantially all revenues over time as follows:

Public school district revenue
The Charter School recognizes revenue as educational programming is provided to students throughout the year. The Charter School earns public school district revenue based on the approved per pupil tuition rate of the public-school district in which the pupil resides. The amount received each year from the resident district is the product of the approved per pupil tuition rate and the full-time equivalent student enrollment of the Charter School. Each NYS school district has a fixed per pupil tuition rate which is calculated annually by NYSED in accordance with NYS Education Law. Amounts are billed in advance every other month and payments are typically received in six installments during the year. At the end of each school year, a reconciliation of actual enrollment to billed enrollment is performed and any additional amounts due or excess funds received are agreed upon between the Charter School and the district(s) and are paid or recouped. Additional funding is available for students requiring special education services. The amount of additional funding is dependent upon the length of time and types of services provided by the Charter School to each student, subject to a maximum amount based upon a set rate for each district as calculated by NYSED.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Rental assistance

Facilities rental assistance funding is provided by the New York City Dept of Education (NYCDOE) to qualifying charter schools located in the five boroughs of NYC. In order to receive rental assistance funding, a charter school must have commenced instruction or added grade levels in the 2014-15 school year or thereafter and go through a space request process with the NYCDOE. If NYCDOE is not able to provide adequate space, the charter school can become eligible for rental assistance. Rental assistance is calculated as the lesser of 30% of the per-pupil tuition rate for NYC times the number of students enrolled, or actual total rental costs. As rental assistance is based on the number of students enrolled, revenue is recognized throughout the year as educational programming is provided to students.

The following table summarizes contract balances at their respective statement of financial position dates:

	June 30,		
	2025	2024	2023
Grants and contracts receivable	$ 27,310	$ 171,172	$ 429,638

Contributions

The Charter School recognizes contributions when cash, securities or other assets, an unconditional promise to give, or a notification of a beneficial interest is received. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

Contributions, including unconditional promises to give, are recognized as revenue in the period received. All donor-restricted contributions are reported as increases in net assets with donor restrictions depending on the nature of the restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities and changes in net assets as net assets released from restrictions.

Grant revenue

Some of the Charter School's revenue is derived from cost-reimbursable federal and state contracts and grants, which are conditioned upon certain performance requirements and/or the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when the Charter School has incurred expenditures in compliance with specific contract or grant provisions. Certain grants are subject to audit and retroactive adjustments by its funders. Any changes resulting from these audits are recognized in the year they become known. Qualifying expenditures that have been incurred but are yet to be reimbursed are reported as grants receivable in the accompanying statement of financial position. Amounts received prior to incurring qualifying expenditures are reported as deferred revenue in the accompanying statement of financial position and amounted to $2,992 and $7,206 at June 30, 2025 and 2024, respectively. The Charter School received cost-reimbursement grants of approximately $32,000 that have not been recognized at June 30, 2025, because qualifying expenditures have not yet been incurred.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Cash and cash equivalents

Cash and cash equivalent balances are maintained at financial institutions located in the United States of America and are insured by the FDIC up to $250,000 at each institution. The Charter School considers all highly liquid instruments purchased with a maturity of three months or less to be cash equivalents. Cash equivalents consist of money market accounts. In the normal course of business, the cash account balances at any given time may exceed insured limits. However, the Charter School has not experienced any losses in such accounts and does not believe it is exposed to significant risk in cash and cash equivalents.

Cash in escrow

The Charter School maintains cash in an escrow account in accordance with the terms of its charter agreement. The agreement requires a balance of $225,000 be maintained to fund any audit and legal expenses incurred should the Charter School cease operations and dissolve. The amount in escrow was $225,000 at both June 30, 2025 and 2024.

Investments

Investments consist of cash equivalents and are measured at fair value. At June 30, 2025 and 2024, the Charter School also invested into twelve certificates of deposit, with maturities ranging from three to twelve months and interest rates ranging from 3.15% to 3.73%.

Investment income includes interest, recorded on an accrual basis, dividends, net realized gains and losses, and net unrealized gains and losses, resulting from the change in prevailing market value of investments. Purchase and sales of investments are recorded on a trade-date basis.

Grants and other receivables

At each fiscal year end, the Charter School evaluates the need for an expected allowance for credit losses for all outstanding balances that fall under ASU 2014-09. As necessary, the allowance for credit losses is updated at fiscal year-end to reflect any changes in credit risk since the receivable was initially recorded. The allowance for credit losses is calculated on a pooled basis where similar risk characteristics exist.

The Charter School uses historical loss data as a starting point to estimate expected credit losses, given consistent revenue sources since inception. There were write-offs of $18,994 for the year ended June 30, 2025. There were no write-offs for the year ended June 30, 2024.

Property and equipment

Property and equipment are recorded at cost. The Charter School capitalizes all purchases of fixed assets in excess of $5,000. Depreciation and amortization are computed using the straight-line method on a basis considered adequate to depreciate the assets over their estimated useful lives, which range from 4 to 39 years. Leasehold improvements are being amortized over the shorter of the estimated useful life of the asset or the remaining term of the related lease.

Major renewals and betterments are capitalized, while repairs and maintenance are charged to operations as incurred. Upon sale or retirement, the related cost and allowances for depreciation are removed from the accounts and the related gain or loss is reflected in operations.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Deferred revenue
The Charter School records grant revenue as deferred revenue until it is expended for the purpose of the grant, at which time it is recognized as revenue.

Leases
The Charter School leases its school facilities and determines if an arrangement is a lease at inception. Operating leases are included in operating lease right-of-use (ROU) assets, other current liabilities, and operating lease liabilities on the accompanying statement of financial position. There were no finance leases at June 30, 2025 and 2024.

ROU assets represent the Charter School's right to use an underlying asset for the lease term and lease liabilities represent the obligation to make lease payments arising from the lease. Operating lease ROU assets and liabilities are recognized at commencement date based on the present value of lease payments over the lease term. As most of the leases do not provide an implicit rate, the Charter School uses a risk-free rate based on the information available at commencement date in determining the present value of lease payments. The operating lease ROU asset also includes any lease payments made and excludes lease incentives. The lease terms may include options to extend or terminate the lease when it is reasonably certain that the Charter School will exercise that option. Lease expense for operating lease payments is recognized on a straight-line basis over the lease term.

The Charter School's lease agreements do not contain any material residual value guarantees or material restrictive covenants.

In evaluating contracts to determine if they qualify as a lease, the Charter School considers factors such as if the Charter School has obtained substantially all of the rights to the underlying asset through exclusivity, if the Charter School can direct the use of the asset by making decisions about how and for what purpose the asset will be used and if the lessor has substantive substitution rights. This evaluation may require significant judgement.

Tax exempt status
The Charter School is a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code and applicable state regulations and, accordingly, is exempt from federal and state taxes on income.

The Charter School files Form 990 tax returns in the U.S. federal jurisdiction. The Charter School's current and prior three years tax returns remain subject to review by taxing authorities. Management of the Charter School believes it has no material uncertain tax positions and, accordingly it will not recognize any liability for unrecognized tax benefits.

Contributed services
The Charter School receives contributed services from volunteers to develop its academic program and to serve on the Board of Trustees. In addition, the Charter School received donated transportation services, metro cards, funding for free and reduced-cost breakfasts, lunches and snacks, special education services and physical, occupational, and speech therapy that was also provided for the students from the local district. The Charter School is not able to determine a value for these services.

NOTE A: THE CHARTER SCHOOL AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, Cont'd

Marketing and recruiting costs

The Charter School expenses marketing and recruiting costs as they are incurred. Total marketing and recruiting costs approximated $266,000 and $278,000 for the years ended June 30, 2025 and 2024, respectively.

Comparatives for year ended June 30, 2024

The financial statements include certain prior year summarized comparative information in total but not by functional classification. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States of America. Accordingly, such information should be read in conjunction with the Charter School's financial statements for the year ended June 30, 2024, from which the summarized information was derived.

Use of estimates in the preparation of financial statements

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

Subsequent events

The Charter School has conducted an evaluation of potential subsequent events occurring after the statement of financial position date through October 24, 2025, which is the date the financial statements are available to be issued. No subsequent events requiring disclosure were noted.

NOTE B: LIQUIDITY AND AVAILABILITY

The Charter School regularly monitors liquidity required to meet its operating needs and other contractual commitments. The Charter School's main source of liquidity is its cash and investment accounts.

For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Charter School considers all expenditures related to its ongoing activities of teaching, and public service as well as the conduct of services undertaken to support those activities to be general expenditures.

In addition to financial assets available to meet general expenditures over the next 12 months, the Charter School operates with a surplus budget and anticipates collecting sufficient revenue to cover general expenditures not covered by donor-restricted resources. Refer to the statement of cash flows which identifies the sources and uses of the Charter School's cash and shows positive cash generated by operations for fiscal years 2025 and 2024.

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, comprise the following:

	June 30,	
	2025	2024
Cash and cash equivalents	$ 20,440,623	$ 7,351,922
Grants and contracts receivable	1,830,987	9,193,802
Investments	22,202,827	21,200,467
Due from related parties	269,763	73,612
Total financial assets available to management for general expenditures within one year	$ 44,744,200	$ 37,819,803

NOTE C: RELATED PARTY TRANSACTIONS

Excellence Community Schools, Inc. ("Excellence"), a not-for-profit organization dedicated to helping start and run charter schools, provides management and other administrative support services to the Charter School. The Charter School entered into an educational services agreement with Excellence whereby Excellence will provide the Charter School with services related to education and instruction, business operations, human resources and employment. In turn, Excellence shall be paid a fee equal to 15% of all public revenues received by the Charter School during the fiscal year. This agreement is extended through the Charter term, currently July 2029. The Charter School incurred fees of approximately $9,051,000 and $8,769,000 for the years ended June 30, 2025 and 2024, respectively.

At June 30, 2025 and 2024, approximately $1,456,000 and $1,843,000, respectively, of fees were accrued in management fees due to charter management organization on the accompanying statement of financial position.

NOTE C: RELATED PARTY TRANSACTIONS, Cont'd

Approximately $194,600 and $72,100 is due to the Charter School from Excellence for expenses that are to be reimbursed by Excellence after June 30, 2025 and 2024, respectively. These amounts are included in due from related parties on the accompanying statement of financial position at June 30, 2025 and 2024. In addition, the Charter School has formalized sub-lease agreements for four facilities with Excellence. See Note D for more details.

Stamford Charter School for Excellence ("Stamford") is an educational corporation that operates as a charter school in Stamford, Connecticut. Approximately $75,200 and $1,500 is due to the Charter School from Stamford for expenses that are to be reimbursed by Stamford after June 30, 2025 and 2024, respectively. These amounts are included in due from related parties on the accompanying statement of financial position at June 30, 2025 and 2024.

NOTE D: LEASES

The Charter School leases the facility for the Bronx Excellence 2 location. Effective July 1, 2016, the Charter School assigned the lease to Excellence. The sub-lease agreement between the Charter School and Excellence was finalized February 7, 2018 under the same terms of the original lease agreement. The lease term was through June 30, 2021. The Charter School renegotiated a one-year lease, signed March 2022 covering the period July 1, 2021 through June 30, 2022. In March 2024, the lease was extended through June 30, 2024. Effective July 1, 2024, the lease was extended through June 30, 2038 with an additional five year option to extend the lease. The base rent is approximately $87,900 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term. The Charter School paid $53,500 of security deposits relative to this agreement.

In July 2022, the Charter School entered into a sub-lease agreement with a single member LLC related to Excellence for the facility for the Bronx Excellence 2 Middle School location. The term of the lease began July 1, 2022 and goes through June 30, 2052. The base rent is approximately $112,300 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term.

In September 2017, the Charter School commenced the process to enter into a sub-lease agreement with Excellence for the facility for the Bronx Excellence 3 location. The sub-lease agreement was finalized as of February 7, 2018. The term of the lease began August 9, 2017 and goes through July 31, 2032. The base rent is approximately $99,100 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term.

In July 2019, the Charter School entered into a sub-lease agreement with a single member LLC related to Excellence for the facility for the Bronx Excellence 5 location. The term of the lease began July 1, 2019 and goes through June 30, 2039. The base rent is approximately $106,300 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term. The Charter School paid $59,319 of security deposits relative to this agreement.

NOTE D: LEASES, Cont'd

In August 2020, the Charter School entered into a sub-lease agreement with a single member LLC related to Excellence for the facility for the Bronx Excellence 4 location. The term of the lease began July 1, 2020 and goes through June 30, 2040. The base rent is approximately $94,100 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term. The Charter School paid $530,000 of security deposits relative to this agreement.

In July 2022, the Charter School entered into a sub-lease agreement with a single member LLC related to Excellence for the facility for the Bronx Excellence 3 and 4 Middle School location. The term of the lease began July 1, 2022 and goes through June 30, 2037. The base rent is approximately $100,900 per month for the year ended June 30, 2025. The lease has escalating payments throughout the term. The Charter School paid $139,500 of security deposits relative to this agreement.

Total rental expense was approximately $8,619,000 and $7,941,000 for the years ended June 30, 2025 and 2024, respectively.

The Charter School also leases office equipment under non-cancelable lease agreements at a monthly cost of approximately $17,900 that will expire at various dates through February 2029. Total equipment lease expense was approximately $206,000 and $202,500 for the years ended June 30, 2025 and 2024, respectively.

A summary of lease right-of-use assets and liabilities are as follows:

Assets	Statement of Financial Position Classification	June 30, 2025	June 30, 2024
Right-of-use assets - operating	Other assets	$ 101,953,328	$ 95,380,725
Liabilities			
Current portion of lease liabilities - operating	Current liabilities	$ 4,242,034	$ 3,191,533
Long-term lease liabilities - operating	Other liabilities	104,499,675	97,562,921
		$ 108,741,709	$ 100,754,454

The components of lease expense were as follows:

	Year ended June 30, 2025	Year ended June 30, 2024
Operating lease expense	$ 8,825,106	$ 7,810,081

NOTE D: LEASES, Cont'd

As of June 30, 2025, minimum payments due for lease liabilities are as follows:

	Operating leases
2026	$ 7,661,931
2027	7,817,819
2028	7,973,949
2029	8,079,331
2030	8,295,488
Thereafter	107,856,705
	147,685,223
Less: interest	(38,943,514)
Present value of lease liabilities	$ 108,741,709

Supplemental information is as follows:

	Year ended June 30,	
	2025	2024
Cash paid for amounts included in the measurement of lease liabilities:		
Operating cash flows paid for operating leases	$ 7,322,541	$ 6,118,236
Right-of-use assets obtained in exchange for new lease liabilities:		
Operating leases	$ 11,764,835	$ 348,939
Weighted-average remaining lease term:		
Operating leases	18.22 years	19.47 years
Weighted-average discount rate:		
Operating leases	3.22%	3.20%

NOTE E: PROPERTY AND EQUIPMENT

Property and equipment consists of the following:

	June 30,	
	2025	2024
Land	$ 914,772	$ 914,772
Buildings	34,048,184	34,054,338
Furniture and fixtures	1,284,365	1,256,786
Computers and equipment	4,885,162	4,515,762
Leasehold improvements	3,406,387	3,220,326
Construction in progress	53,277	-
	44,592,147	43,961,984
Less accumulated depreciation and amortization	14,651,290	12,782,378
	$ 29,940,857	$ 31,179,606

Construction in progress at June 30, 2025 is comprised of building leasehold improvements not yet completed and put into service. Construction in progress is stated at cost. No provision for depreciation is made on construction in progress until such time as the relevant assets are completed and put into service.

Total depreciation and amortization expense was $1,868,912 and $1,831,758 for the years ended June 30, 2025 and 2024, respectively.

NOTE F: FAIR VALUE MEASUREMENTS

Accounting principles generally accepted in the United States of America establishes a framework for measuring fair value. The framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques to measure the fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements). The three levels of the fair value hierarchy under FASB ASC 820-10 are described below:

Level 1 - Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets.

Level 2 - Inputs to the valuation methodology include:
- Quoted prices for similar assets or liabilities in active markets;
- Quoted prices for identical or similar assets or liabilities in inactive markets;
- Inputs other than quoted prices that are observable for the asset or liability;
- Inputs that are derived principally from or corroborated by observable market data by correlation or other means.

NOTE F: FAIR VALUE MEASUREMENTS, Cont'd

If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3 - Inputs to the valuation methodology are unobservable and significant to the fair value measurements.

The asset's or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets and liabilities measured at fair value. There have been no changes in the methodologies used at June 30, 2025 or 2024 :

Certificates of deposit: Fair values are calculated based on the exact runoff of principal for each CD in each category given its contractual maturity, discounted at an appropriate term rate.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, while the Charter School believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The following table sets forth by level, within the fair value hierarchy; the Charter School's investment assets measured at fair value on a recurring basis as of:

	Assets at Fair Value			
	Level 1	Level 2	Level 3	Total
June 30, 2025				
Certificates of deposit	$ -	$ 22,202,827	$ -	$ 22,202,827
Total assets at fair value	$ -	$ 22,202,827	$ -	$ 22,202,827
June 30, 2024				
Certificates of deposit	$ -	$ 21,200,467	$ -	$ 21,200,467
Total assets at fair value	$ -	$ 21,200,467	$ -	$ 21,200,467

Investment securities are exposed to various risks, such as interest rate, market and credit risk. Due to the risk associated with investment securities, it is at least reasonably possible that changes in risk could materially affect the accompanying financial statements.

NOTE G: RETIREMENT PLAN

The Charter School sponsors a defined contribution 403(b) plan covering all eligible employees. The Charter School matches up to 5% of each employee's annual compensation not to exceed the employee's salary deferral amount. The Charter School may also elect to make additional contributions to the plan on a discretionary basis. The Charter School made contributions of approximately $663,000 and $489,000 for the years ended June 30, 2025 and 2024, respectively.

NOTE H: CONTINGENCY

Certain grants and contracts may be subject to audit by funding sources. Such audits might result in disallowance of costs submitted for reimbursement by the Charter School. Management is of the opinion that such disallowances, if any, will not have a material effect on the accompanying financial statements. Accordingly, no amounts have been provided in the accompanying financial statements for such potential claims.

NOTE I: CONCENTRATIONS

At June 30, 2025, approximately 97% of grants and contracts receivable are due from the Federal government, relating to certain grants. For the year ended June 30, 2025, 92% of total operating revenue and support came from per-pupil funding provided by New York State. The per-pupil rate is set annually by the State based on the school district in which the Charter School's students are located.

At June 30, 2024, approximately 98% of grants and contracts receivables are due from the Federal government, relating to certain grants. For the year ended June 30, 2024, 84% of total operating revenue and support came from per-pupil funding provided by New York State. The per-pupil rate is set annually by the State based on the school district in which the Charter School's students are located.

NOTE J: NET ASSETS

Net assets without donor restrictions are as follows:

	June 30,	
	2025	2024
Undesignated	$ 31,917,947	$ 26,268,866
Invested in property and equipment, net of related debt	29,940,857	31,179,606
	$ 61,858,804	$ 57,448,472

NOTE K: FUNCTIONAL EXPENSES

The financial statements report certain categories of expenses that are attributed to more than one program or supporting function. Therefore, expenses require allocation on a reasonable basis that is consistently applied. All expenses that are allocated to more than one program or supporting function are allocated on the basis of estimates of time and effort.

NOTE L: ACCOUNTING IMPACT OF COVID-19

In response to the COVID-19 outbreak, the Federal Government passed several COVID relief acts which included funding for elementary and secondary education. The Elementary and Secondary School Emergency Relief Fund (ESSER Fund) was established to award grants to state and local educational agencies. The Charter School has recognized approximately $167,000 and $4,857,000 of revenue relative to ESSER grants during the years ended June 30, 2025 and 2024, respectively. As of September 2024, the Charter School no longer has ESSER grants available for expenditure.

BRONX CHARTER SCHOOL FOR EXCELLENCE

OTHER FINANCIAL INFORMATION

INDEPENDENT AUDITOR'S REPORT ON OTHER FINANCIAL INFORMATION

Board of Trustees
Bronx Charter School for Excellence

We have audited the financial statements of Bronx Charter School for Excellence as of and for the year ended June 30, 2025, and have issued our report thereon dated October 24, 2025, which contained an unmodified opinion on those financial statements. Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole.

The 2025 financial information hereinafter is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements for the year ended June 30, 2025, as a whole.

Mengel, Metzger, Barr & Co. LLP

Rochester, New York
October 24, 2025

Canandaigua + Elmira + Latham + Queensbury + Rochester
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BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF ACTIVITIES BY CHARTER

YEAR ENDED JUNE 30, 2025

	Bronx Excellence 1	Bronx Excellence 2	Bronx Excellence 3	Bronx Excellence 4	Bronx Excellence 5	Total
Revenue, gains and other support:						
Public school district:						
Resident student enrollment	$ 14,997,674	$ 9,701,642	$ 9,500,167	$ 8,512,191	$ 6,012,512	$ 48,724,186
Students with disabilities	131,344	57,147	150,884	29,335	27,354	396,064
Grants and contracts:						
State and local	59,774	36,244	37,458	27,807	20,803	182,086
Federal - Title and IDEA	657,772	391,625	377,932	382,179	330,052	2,139,560
Federal - other	43,652	45,437	18,594	80,456	145,790	333,929
Food service / Child nutrition program	403,279	231,359	265,893	310,126	181,994	1,392,651
NYC DoE Rental Assistance	-	2,402,314	1,961,837	1,565,222	1,275,524	7,204,897
TOTAL REVENUE, GAINS AND OTHER SUPPORT	16,293,495	12,865,768	12,312,765	10,907,316	7,994,029	60,373,373
Expenses:						
Program:						
Regular education	11,949,366	10,024,079	9,487,814	7,437,324	5,833,428	44,732,011
Special education	1,741,040	1,988,662	1,878,773	1,426,360	1,304,659	8,339,494
Management and general	1,136,239	912,126	860,772	638,786	499,375	4,047,298
TOTAL OPERATING EXPENSES	14,826,645	12,924,867	12,227,359	9,502,470	7,637,462	57,118,803
SURPLUS (DEFICIT) FROM SCHOOL OPERATIONS	1,466,850	(59,099)	85,406	1,404,846	356,567	3,254,570
Support and other revenue:						
Contributions:						
Foundations	300	2,500	-	-	-	2,800
Corporations	1,200	2,000	-	-	-	3,200
Investment income	1,149,233	-	-	-	-	1,149,233
Miscellaneous income	529	-	-	-	-	529
TOTAL SUPPORT AND OTHER REVENUE	1,151,262	4,500	-	-	-	1,155,762
CHANGE IN NET ASSETS	2,618,112	(54,599)	85,406	1,404,846	356,567	4,410,332
Net assets at beginning of year	26,962,773	8,802,983	11,702,390	6,419,802	3,560,524	57,448,472
NET ASSETS AT END OF YEAR	$ 29,580,885	$ 8,748,384	$ 11,787,796	$ 7,824,648	$ 3,917,091	$ 61,858,804

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES BY CHARTER – BRONX EXCELLENCE 1

YEAR ENDED JUNE 30, 2025

		Program Services			Supporting Services	
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total
Personnel Services Costs:						
Administrative staff personnel	16	$ 922,145	$ 307,381	$ 1,229,526	$ 307,381	$ 1,536,907
Instructional personnel	44	4,022,761	451,874	4,474,635	120,882	4,595,517
Non-instructional personnel	4	104,210	34,737	138,947	34,737	173,684
Total salaries and wages	64	5,049,116	793,992	5,843,108	463,000	6,306,108
Payroll taxes and employee benefits		880,245	138,422	1,018,667	80,718	1,099,385
Retirement		133,599	21,009	154,608	12,251	166,859
Management fees		1,955,058	307,440	2,262,498	179,277	2,441,775
Legal fees		-	-	-	2,116	2,116
Audit/accounting fees		-	-	-	14,858	14,858
Professional services		1,191,066	128,616	1,319,682	89,961	1,409,643
Repairs and maintenance		255,439	40,169	295,608	23,424	319,032
Insurance		-	-	-	87,408	87,408
Utilities		244,234	38,407	282,641	22,396	305,037
Curriculum and classroom supplies		409,360	28,001	437,361	-	437,361
Non-capitalized equipment and furnishings		83,971	12,584	96,555	7,060	103,615
Professional development		93,639	14,725	108,364	8,587	116,951
Student and staff recruitment		65,048	9,204	74,252	4,907	79,159
Technology		112,087	17,601	129,688	10,253	139,941
Food service		431,104	29,488	460,592	-	460,592
Student services		33,898	2,319	36,217	-	36,217
Office expenses		76,168	11,978	88,146	7,306	95,452
Depreciation and amortization		920,563	144,762	1,065,325	84,415	1,149,740
Other		14,771	2,323	17,094	38,302	55,396
		$ 11,949,366	$ 1,741,040	$ 13,690,406	$ 1,136,239	$ 14,826,645

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES BY CHARTER – BRONX EXCELLENCE 2

YEAR ENDED JUNE 30, 2025

		Program Services			Supporting Services	
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total
Personnel Services Costs:						
Administrative staff personnel	15	$ 855,250	$ 285,083	$ 1,140,333	$ 285,083	$ 1,425,416
Instructional personnel	31	2,882,564	467,347	3,349,911	-	3,349,911
Non-instructional personnel	6	142,711	47,570	190,281	47,570	237,851
Total salaries and wages	52	3,880,525	800,000	4,680,525	332,653	5,013,178
Payroll taxes and employee benefits		632,109	130,314	762,423	54,187	816,610
Retirement		118,662	24,463	143,125	10,172	153,297
Management fees		1,493,318	307,859	1,801,177	128,013	1,929,190
Legal fees		-	-	-	1,311	1,311
Audit/accounting fees		-	-	-	13,974	13,974
Professional services		448,567	62,297	510,864	50,009	560,873
Building and land rent		2,526,181	520,791	3,046,972	216,554	3,263,526
Repairs and maintenance		771	159	930	66	996
Insurance		-	-	-	58,744	58,744
Utilities		4,173	860	5,033	358	5,391
Curriculum and classroom supplies		247,933	28,133	276,066	-	276,066
Non-capitalized equipment and furnishings		36,113	7,207	43,320	2,876	46,196
Professional development		39,702	8,185	47,887	3,403	51,290
Student and staff recruitment		33,318	6,808	40,126	2,800	42,926
Technology		80,339	15,685	96,024	6,076	102,100
Food service		222,852	25,287	248,139	-	248,139
Student services		31,158	3,536	34,694	-	34,694
Office expenses		54,704	11,278	65,982	4,689	70,671
Depreciation and amortization		173,654	35,800	209,454	14,886	224,340
Other		-	-	-	11,355	11,355
		$ 10,024,079	$ 1,988,662	$ 12,012,741	$ 912,126	$ 12,924,867

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES BY CHARTER – BRONX EXCELLENCE 3

YEAR ENDED JUNE 30, 2025

		Program Services			Supporting Services	
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total
Personnel Services Costs:						
Administrative staff personnel	14	$ 812,608	$ 270,869	$ 1,083,477	$ 270,869	$ 1,354,346
Instructional personnel	40	2,898,121	488,016	3,386,137	-	3,386,137
Non-instructional personnel	7	189,151	63,050	252,201	63,050	315,251
Total salaries and wages	61	3,899,880	821,935	4,721,815	333,919	5,055,734
Payroll taxes and employee benefits		762,590	160,723	923,313	65,295	988,608
Retirement		111,175	23,431	134,606	9,519	144,125
Management fees		1,424,148	300,152	1,724,300	121,940	1,846,240
Legal fees		-	-	-	5,264	5,264
Audit/accounting fees		-	-	-	14,023	14,023
Professional services		504,651	64,701	569,352	51,839	621,191
Building and land rent		1,606,152	338,511	1,944,663	137,524	2,082,187
Repairs and maintenance		68,566	14,451	83,017	5,871	88,888
Insurance		-	-	-	60,313	60,313
Utilities		63,340	13,350	76,690	5,423	82,113
Curriculum and classroom supplies		269,791	21,475	291,266	-	291,266
Non-capitalized equipment and furnishings		41,527	7,571	49,098	2,785	51,883
Professional development		55,036	11,599	66,635	4,712	71,347
Student and staff recruitment		57,555	8,981	66,536	2,871	69,407
Technology		112,377	23,591	135,968	9,561	145,529
Food services		276,575	22,015	298,590	-	298,590
Student services		23,829	1,897	25,726	-	25,726
Office expenses		47,753	10,064	57,817	4,089	61,906
Depreciation and amortization		162,869	34,326	197,195	13,945	211,140
Other		-	-	-	11,879	11,879
		$ 9,487,814	$ 1,878,773	$ 11,366,587	$ 860,772	$ 12,227,359

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES BY CHARTER – BRONX EXCELLENCE 4

YEAR ENDED JUNE 30, 2025

		Program Services			Supporting Services	
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total
Personnel Services Costs:						
Administrative staff personnel	10	$ 653,713	$ 217,904	$ 871,617	$ 217,904	$ 1,089,521
Instructional personnel	27	2,244,467	352,940	2,597,407	-	2,597,407
Non-instructional personnel	2	57,005	19,002	76,007	19,002	95,009
Total salaries and wages	39	2,955,185	589,846	3,545,031	236,906	3,781,937
Payroll taxes and employee benefits		519,480	103,687	623,167	41,645	664,812
Retirement		93,379	18,638	112,017	7,486	119,503
Management fees		1,277,910	255,067	1,532,977	102,445	1,635,422
Legal fees		-	-	-	4,169	4,169
Audit/accounting fees		-	-	-	7,555	7,555
Professional services		366,063	58,847	424,910	42,850	467,760
Building and land rent		1,380,481	275,540	1,656,021	110,668	1,766,689
Repairs and maintenance		885	177	1,062	71	1,133
Insurance		-	-	-	47,373	47,373
Utilities		4,432	885	5,317	355	5,672
Curriculum and classroom supplies		221,591	25,029	246,620	-	246,620
Non-capitalized equipment and furnishings		27,116	5,279	32,395	2,050	34,445
Professional development		30,154	6,019	36,173	2,417	38,590
Student and staff recruitment		30,956	6,147	37,103	2,452	39,555
Technology		72,616	14,479	87,095	5,808	92,903
Food service		270,008	30,498	300,506	-	300,506
Student services		12,882	1,455	14,337	-	14,337
Office expenses		37,455	7,476	44,931	3,003	47,934
Depreciation and amortization		136,731	27,291	164,022	10,961	174,983
Other		-	-	-	10,572	10,572
		$ 7,437,324	$ 1,426,360	$ 8,863,684	$ 638,786	$ 9,502,470

BRONX CHARTER SCHOOL FOR EXCELLENCE

STATEMENT OF FUNCTIONAL EXPENSES BY CHARTER – BRONX EXCELLENCE 5

YEAR ENDED JUNE 30, 2025

		Program Services			Supporting Services	
	No. of Positions	Regular Education	Special Education	Sub-total	Management and general	Total
Personnel Services Costs:						
Administrative staff personnel	10	$ 464,023	$ 154,674	$ 618,697	$ 154,674	$ 773,371
Instructional personnel	25	1,966,456	392,932	2,359,388	-	2,359,388
Non-instructional personnel	2	80,012	26,671	106,683	26,671	133,354
Total salaries and wages	37	2,510,491	574,277	3,084,768	181,345	3,266,113
Payroll taxes and employee benefits		356,963	81,656	438,619	25,785	464,404
Retirement		61,139	13,986	75,125	4,416	79,541
Management fees		921,170	210,718	1,131,888	66,541	1,198,429
Legal fees		-	-	-	4,014	4,014
Audit/accounting fees		-	-	-	7,241	7,241
Professional services		290,027	55,567	345,594	64,575	410,169
Building and land rent		1,158,184	264,935	1,423,119	83,661	1,506,780
Repairs and maintenance		3,411	780	4,191	246	4,437
Insurance		-	-	-	37,565	37,565
Utilities		-	-	-	-	-
Curriculum and classroom supplies		129,470	21,561	151,031	-	151,031
Non-capitalized equipment and furnishings		13,942	3,120	17,062	927	17,989
Professional development		20,660	4,726	25,386	1,492	26,878
Student and staff recruitment		27,031	6,143	33,174	1,906	35,080
Technology		58,332	13,314	71,646	4,180	75,826
Food service		166,489	27,726	194,215	-	194,215
Student service		6,624	1,103	7,727	-	7,727
Office expenses		25,936	5,933	31,869	1,873	33,742
Depreciation and amortization		83,559	19,114	102,673	6,036	108,709
Other		-	-	-	7,572	7,572
		$ 5,833,428	$ 1,304,659	$ 7,138,087	$ 499,375	$ 7,637,462

BRONX CHARTER SCHOOL FOR EXCELLENCE

REPORT REQUIRED BY GOVERNMENT AUDITING STANDARDS

INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

Board of Trustees
Bronx Charter School for Excellence

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Bronx Charter School for Excellence which comprise the statement of financial position as of June 30, 2025 and the related statements of activities and changes in net assets, functional expenses and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 24, 2025.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Bronx Charter School for Excellence's internal control over financial reporting (internal control) as a basis for designing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Bronx Charter School for Excellence's internal control. Accordingly, we do not express an opinion on the effectiveness of Bronx Charter School for Excellence's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Canandaigua + Elmira + Latham + Queensbury + Rochester
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Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether Bronx Charter School for Excellence's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed one instance of noncompliance or other matters that is required to be reported under *Government Auditing Standards* and which is described in the accompanying Schedule of Findings and Responses, as item 2025-001.

Bronx Charter School For Excellence's Response to Finding

Bronx Charter School for Excellence's response to the finding identified in our audit is described in the accompanying Schedule of Findings and Responses. Bronx Charter School for Excellence's response was not subjected to the auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on it.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Mengel, Metzger, Barr & Co. LLP

Rochester, New York
October 24, 2025

WE VALUE YOUR FUTURE

BRONX CHARTER SCHOOL FOR EXCELLENCE

SCHEDULE OF FINDINGS AND RESPONSES

YEAR ENDED JUNE 30, 2025

FINDINGS – FINANCIAL STATEMENT AUDIT

Finding 2025-001

Statement of condition
During our audit, we noted the Charter School did not adhere to the terms of their charter agreement as one of the five schools' enrollment fell below 80% of the projected enrollment for the 2024-2025 academic year and written approval from NYSED was not obtained.

Criteria and effect of conditions
During our audit, we noted the Charter School's charter agreement requires the Charter School to obtain written approval from NYSED prior to commencing or continuing instruction when the total number of students enrolled is less than 80% of the projected enrollment for a given academic year. We noted Bronx Charter School for Excellence 5's enrollment was 75% of the projected enrollment for the 2024- 2025 academic year.

Recommendation
We recommend the Charter School obtain written approval from NYSED if enrollment falls below 80% of projected enrollment for a given academic year.

Management response
The Charter School will ensure to receive written approval should enrollment fall below 80% in future years.

B Form 54 (Rev. 8/85)

G.G.
ALT. 439/85

THE CITY OF NEW YORK

DEPARTMENT OF BUILDINGS
CERTIFICATE OF OCCUPANCY

BOROUGH BRONX DATE: FEB 24 1989 NO. 58210

This certificate supersedes C.O. No. 28857 (HS) ZONING DISTRICT R4

THIS CERTIFIES that the ~~new~~ - altered - ~~existing~~ - building - premises located at
1744 E.S. WILLIAMSBRIDGE RD, S.E. CORNER MORRIS PARK AVE Block 4114 Lot 1
CONFORMS SUBSTANTIALLY TO THE APPROVED PLANS AND SPECIFICATIONS AND TO THE REQUIREMENTS OF ALL APPLICABLE LAWS, RULES, AND REGULATIONS FOR THE USES AND OCCUPANCIES SPECIFIED HEREIN

PERMISSIBLE USE AND OCCUPANCY

STORY	LIVE LOAD LBS PER SQ FT	MAXIMUM NO OF PERSONS PERMITTED	ZONING DWELLING OR ROOMING UNITS	BUILDING CODE HABITABLE ROOMS	ZONING USE GROUP	BUILDING CODE OCCUPANCY GROUP	DESCRIPTION OF USE
CELLAR	O.G.	325			4	G	CLASSROOM
						F-1B	CHURCH
FIRST	100	375			4	G	CLASSROOM
						E	OFFICES

** NOTE **

1. OPEN ACCESSORY PARKING AREA AT REAR FACING YATES AVENUE.

THIS CERTIFICATE OF OCCUPANCY MUST BE POSTED WITHIN THE BUILDING IN ACCORDANCE WITH THE RULES OF THE DEPARTMENT PROMULGATED MARCH 31ST, 1967.

500,000.

OPEN SPACE USES 5000 SQ. FT. PARKING
(SPECIFY—PARKING SPACES, LOADING BERTHS, OTHER USES, NONE)

NO CHANGES OF USE OR OCCUPANCY SHALL BE MADE UNLESS A NEW AMENDED CERTIFICATE OF OCCUPANCY IS OBTAINED

THIS CERTIFICATE OF OCCUPANCY IS ISSUED SUBJECT TO FURTHER LIMITATIONS, CONDITIONS AND SPECIFICATIONS NOTED ON THE REVERSE SIDE.

Bret W. Grosbacher
BOROUGH SUPERINTENDENT R. Cruse

COMMISSIONER

☐ ORIGINAL ☑ OFFICE COPY—DEPARTMENT OF BUILDINGS ☐ COPY

B Form 54 (Rev. 8/85)

FT
ALT 439-85

THE CITY OF NEW YORK

DEPARTMENT OF BUILDINGS

PARTIAL TEMPORARY

CERTIFICATE OF OCCUPANCY

BOROUGH BRONX DATE: JUL 19 1988 NO. 57555

This certificate AMENDS C.O. No. 28857 ZONING DISTRICT R4

THIS CERTIFIES that the new altered existing building premises located at
1744 E/S WILLIAMSBRIDGE RD., SEC MORRIS PARK AVENUE Block 4114 Lot 1

CONFORMS SUBSTANTIALLY TO THE APPROVED PLANS AND SPECIFICATIONS AND TO THE REQUIREMENTS OF ALL APPLICABLE LAWS, RULES, AND REGULATIONS FOR THE USES AND OCCUPANCIES SPECIFIED HEREIN

PERMISSIBLE USE AND OCCUPANCY

STORY	LIVE LOAD LBS PER SQ FT	MAXIMUM NO OF PERSONS PERMITTED	ZONING DWELLING OR ROOMING UNITS	BUILDING CODE HABITABLE ROOMS	ZONING USE GROUP	BUILDING CODE OCCUPANCY GROUP	DESCRIPTION OF USE
FIRST	100	375			4	G E	CLASSROOMS OFFICES

** N O T E **

1. THIS CERTIFICATE OF OCCUPANCY EXPIRES JUL 19 1988
2. WORK AT CELLAR LEVEL OF NEW EXTENSION HAS NOT BEEN COMPLETED. TEMPORARY CERTIFICATE OF OCCUPANCY IS REQUESTED FOR USE OF FIRST FLOOR ONLY.
3. OPEN ACCESSORY PARKING AREA AT REAR FACING YATES AVENUE.

Form 54-79M 701581(59) 114

DEPARTMENT OF BUILDINGS

BOROUGH OF COPY, THE CITY OF NEW YORK

No. 28857

Date APR 1 1960

CERTIFICATE OF OCCUPANCY

(Standard form adopted by the Board of Standards and Appeals and issued pursuant to Section 646 of the New York Charter, and Sections C.26-181.0 to C26-187.0 inclusive Administrative Code 2.1.3.1. to 2.1.3.7. Building Code.)

This certificate supersedes C. O. No. Temp.-27754/59

To the owner or owners of the building or premises:

THIS CERTIFIES that the new—~~altered—existing~~—building—premises located at

1744 Williamsbridge Rd., SE/cor. Morris Park Ave. Block 4114 Lot 1

, conforms substantially to the approved plans and specifications, and to the requirements of the building code and all other laws and ordinances, and of the rules and regulations of the Board of Standards and Appeals, applicable to a building of its class and kind at the time the permit was issued; and

CERTIFIES FURTHER that, any provisions of Section 646F of the New York Charter have been complied with as certified by a report of the Fire Commissioner to the Borough Superintendent.

N.B. ~~xxAkx~~No.— 756-58 Construction classification— Fireproof

Occupancy classification— Public . Height 1 stories, 24' feet.

Date of completion— 12-8-58 . Located in Residence Use District.

C Area Class 1½ . Height Zone at time of issuance of permit

This certificate is issued subject to the limitations hereinafter specified and to the following resolutions of the Board of Standards and Appeals: (Calendar numbers to be inserted here)

PERMISSIBLE USE AND OCCUPANCY

STORY	LIVE LOADS Lbs. per Sq. Ft.	PERSONS ACCOMMODATED MALE	FEMALE	TOTAL	USE
Basement	On Earth	120	120	240	Gymnasium, Stage, Dressing Rm., Kitchen, Storage & Boiler Room.
Front Mezzanine	100				Lobby
Rear Mezzanine	100 60				Locker Rooms, Toilets, Dressing Rm. & Shower Rm.
First	100 60	121	120	241*	Classrooms, Toilets, Teachers' Rm.
	On Ground				Accessory Parking for more than 5 cars in Rear Yard

*This total includes occupants of Rear Mezzanine, at any given time occupied by not more than 30, who will be part of the 241 persons.

$100,000

Form 54-1 (M-701627(55)) 114

DEPARTMENT OF HOUSING AND BUILDINGS

BOROUGH OF BRONX, CITY OF NEW YORK

No. 18261

Date FEB 8 1956

CERTIFICATE OF OCCUPANCY

(Standard form adopted by the Board of Standards and Appeals and issued pursuant to Section 646 of the New York Charter, and Sections C26-181.0 to C26-187.0 inclusive Administrative Code 2.1.3.1. to 2.1.3.7. Building Code.)

This certificate supersedes C. O. No. 18240-56 (Temp.)

To the owner or owners of the building or premises:

THIS CERTIFIES that ~~the~~ new—altered—building—premises located at 1734 Williamsbridge Road, N.E.Corner Morris Park Ave.

Block 4114 Lot

, conforms substantially to the approved plans and specifications, and to the requirements of the building code and all other laws and ordinances, and of the rules and regulations of the Board of Standards and Appeals, applicable to a building of its class and kind at the time the permit was issued; and

CERTIFIES FURTHER that, any provisions of Section 646F of the New York Charter have been complied with as certified by a report of the Fire Commissioner to the Borough Superintendent.

~~New~~ or Alt. No. 394-44 Construction classification Nonfireproof

Occupancy classification PUBLIC . Height 3½ stories, 34'6" ~~feet~~

Date of completion 12-29-55 . Located in Residence Use District

C Area Class 1½ . Height Zone at time of issuance of permit

This certificate is issued subject to the limitations hereinafter specified and to the following resolutions of the Board of Standards and Appeals: (Calendar numbers to be inserted here)

PERMISSIBLE USE AND OCCUPANCY

STORY	LIVE LOADS Lbs. per Sq. Ft.	PERSONS ACCOMMODATED MALE	FEMALE	TOTAL	USE
Basement On ground	270	270	540	Lunch Room, Church
First	100 & 80	105	105	210	Classrooms, Library
Second	60	5	5	10	Library
Third	60	1	1	2	Office, Secretary

NOTE:-Fire Department approval of fuel oil installation received.

RICK KRAMER ARCHITECTS P.C.

Our Savior Lutheran Church
1734 Williams Bridge road
Bronx, New York 10461
RE: 1744 Williamsbridge Road

Attention: Mr. Lewis Williams

September 25, 2006

Dear Mr. Williams;
My office is ready to file the Place of Assembly application with the Department of Buildings. As per the Certificate of Occupancy, the buildings shows a "Church," not a "gymnasium." We will file the PA showing the existing conditions and use the description of "Church" for the filing. If there is a problem with the filing, my office can file an amended Certificate of Occupancy to resolve the gymnasium under a separate contract.

If you have any questions, please do not hesitate to contact my office.

Truly,

Frederick A. Kramer III, R.A.

BILLING ADDRESS
12 PALISADE ST, DOBBS FERRY, NEW YORK 10522
p (914)693.6221 f (914)693.6194 c (646)552.7063

STUDIO ADDRESS
45 GRAND ST, NEW YORK, NEW YORK 10013
email rkaa@optonline.net

No. 949

ISSUE DATE	EXPIRATION DATE	CERTIFICATE NO.
08/23/12	05/18/13	201089561

PREMISES	BORO
1744 WILLIAMSBRIDGE RD	BRONX

BLOCK/LOT: 4114 / 1

NYC™ Buildings

PLACE OF ASSEMBLY
CERTIFICATE OF OPERATION
RENEWAL

ISSUED TO: EVANGELICAL LUTH CH

ADDRESS: 1734 WILLIAMSBRIDGE RD ZIP

Permission is hereby granted to occupy premises as a PLACE OF ASSEMBLY.

OCCUPANCY	STORY	NO. OF PERSONS
AUDITORIUM	CEL	286

This certificate is subject to the strict observance of the laws, rules and regulations enacted for the protection of the public, in so far as they are applicable to this place of assembly, and continues in force for the period specified, unless sooner suspended or revoked. Approved seating plans must be available on-site for inspection by the Department of Buildings or Fire Department.

BOROUGH COMMISSIONER
WERNER DEFOE, R.A.

SHALL BE FRAMED AND MOUNTED IN A LOCATION THAT IS CONSPICUOUSLY VISIBLE TO A PERSON ENTERING THE ESTABLISHMENT PER NYC ADMINISTRATIVE CODE §28-117.1.1

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NYC Department of Buildings

Place of Assembly

Premises: 1722 WILLIAMSBRIDGE ROAD BRONX
BIN: 2097359 **Block:** 4114 **Lot:** 1

Job No: 201089561
Document: 01 OF 1
Job Type: PA - PLACE OF ASSEMBLY

Document Overview | Items Required | Virtual Job Folder | All Comments
Fees Paid | Forms Received | View Job Notes
Crane Information | Plan Examination

Last Action: PLAN EXAM - APPROVED 02/23/2007 (P)

Pre-Filed: 11/14/2006 **Building Type:** Other
Date Filed: 11/14/2006 **Fee Structure:** STANDARD **Filing Method:** PAPER

Comments

1 Location Information

House No(s): 1744 **Street Name:** WILLIAMSBRIDGE RD
Borough: Bronx **Block:** 4114 **Lot:** 1 **BIN:** 2097359 **CB No:** 211
Zoning District(s): R4 - GENERAL RESIDENCE DISTRICT
Overlay(s):
Special District(s):
Zoning Map No.:

2 Applicant of Record Information

Name: FREDERICK KRAMER
Business Name: RICK KRAMER ARCHITECT, PC **Business Phone:** 646-552-7063
Business Address: 12 PALISADE STREET DOBBS FERRY NY 10522 **Business Fax:**
E-Mail: **Mobile Telephone:**
License Number: 020470
Applicant Type: ☐ P.E. ☒ R.A

3 Filing Representative

Name: LORETTA/THOMAS FRLORENZO
Business Name: STERLING ENGINEERING SERVICES PC **Business Phone:** 212-925-2985
Business Address: 45 GRAND STREET NEW YORK NY 10013 **Business Fax:**
E-Mail: **Mobile Telephone:**
Registration Number:

4 Place of Assembly Space Information

Specific Floor(s) of PA Space: CEL
NB/A1 Job No. Establishing PA: NB756-58 ***Pre-BIS*, BIN:** 2097359
Prior PA No.: **Irregular Floor Numbering?** ☐ Yes ☐ No
Name of PA Establishment: OUR SAVIOR LUTHERAN CHURCH

	Occupancy Code	Cabaret	# of Persons	Description
Primary Plan	F-1B	☐ Yes ☐ No	286	04 AUDITORIUM

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NYC Department of Buildings

Place of Assembly

Premises: 1722 WILLIAMSBRIDGE ROAD BRONX
BIN: 2097359 **Block:** 4114 **Lot:** 1

Job No: 200021822
Document: 01 OF 1
Job Type: PA - PLACE OF ASSEMBLY

Document Overview | Items Required | Virtual Job Folder | All Comments
Fees Paid | Forms Received | View Job Notes
Crane Information | Plan Examination

Last Action: PLAN EXAM - APPROVED 01/25/1990 (P)

Pre-Filed: 12/19/1989 **Building Type:** Other
Date Filed: 12/19/1989 **Fee Structure:** EXEMPT **Filing Method:** PAPER

Comments

1 Location Information

House No(s): 1744 **Street Name:** WILLIAMSBRIDGE ROAD
Borough: Bronx **Block:** 4114 **Lot:** 1 **BIN:** 2097359 **CB No:** 211

Zoning District(s): NONE
Overlay(s):
Special District(s):
Zoning Map No.:

2 Applicant of Record Information

Name: JOHN RUDDA
Business Name: TFZ ARCHITECTS, P.C **Business Phone:** 212-758-0391
Business Address: 210 EAST 52ND STREET NEW YORK, NY 10022 **Business Fax:**
E-Mail: **Mobile Telephone:**
License Number: 006812

Applicant Type: ☐ P.E. ☒ R.A

3 Filing Representative

None

4 Place of Assembly Space Information

Specific Floor(s) of PA Space: BST
NB/A1 Job No. Establishing PA: NB756-58 ***Pre-BIS*, BIN:** 2097359
Prior PA No.: **Irregular Floor Numbering?** ☐ Yes ☐ No
Name of PA Establishment:

	Occupancy Code	Cabaret	# of Persons	Description
Primary Plan		☐ Yes ☐ No	240	
Alternate Plan 1		☐ Yes ☐ No		
Alternate Plan 2		☐ Yes ☐ No		

5 Comments

6 Statements and Signatures (Applicant and Owner)

Alternate Plan 1 ☐ Yes ☐ No
Alternate Plan 2 ☐ Yes ☐ No

5 Comments

6 Statements and Signatures (Applicant and Owner)

Owner's Information

Name: LEWIS WILLIAMS
Relationship to Owner:
Business Name: EVAGELICAL LUTHERAN CHURCH
Business Address: 1734 WILLIAMSBRIDGE ROAD BRONX NY 10461
E-Mail:
Non Profit: ☐ Yes ☒ No

Business Phone: 718-792-5665
Business Fax:
Owner Type: CORPORATION

If you have any questions please review these Frequently Asked Questions, the Glossary, or call the 311 Citizen Service Center by dialing 311 or (212) NEW YORK outside of New York City.

CERTIFICATE OF OCCUPANCY

No. 518 Issued NOV 24 1917 191

To Rev. D. J. Curley OWNER of

Premises near. Holland Ave & Morris Park Ave

COPIES

DATE	NAME	ADDRESS
NOV 24 1917		
	Mailed to above.	

STORIES	CLASSIFICATION	CONSTRUCTION
1.	School Lavatory	Hollow Tile

FLOORS	OCCUPANCY	Live Load Per Sq. Feet in Pounds	No. of Persons
Sub-Cellar - -			
Cellar - - - -			
Basement - - -			
First Floor - -			

N. B. Application

No. 218 1917